



Primary Care Management Module (PCMM)

User Manual

September 1999

Revised June 2015

Department of Veterans Affairs
Office of Information and Technology (OI&T)
Office of Enterprise Development (OED)

Revision History

Initiated on 12/23/2004

Date	Description (Patch # if applicable.)	Project Manager	Technical Writer
12/23/2004	Manual updated to comply with SOP 192-352 Displaying Sensitive Data	REDACTED	REDACTED
12/11/2006	Manual updated to reflect additional functionality introduced with Patch SD*5.3*297	REDACTED	REDACTED
08/08/2007	Manual updated to show changes with Patch SD*5.3*483 – 508 Compliant Graphical User Interface (GUI)	REDACTED	REDACTED
08/13/2007	Manual updated to show changes with Patch SD*5.3*498	REDACTED	REDACTED
09/26/2007	Manual updated to show changes with Patch SD*5.3*515 – Added Non Primary Care Team set up for OIF OEF Case Management	REDACTED	REDACTED
05/20/2008	Manual updated to show changes with Patch SD*5.3*499 – Modifications to PCMM NIGHTLY TASK processing.	REDACTED	REDACTED
10/10/2008	Manual updated to show changes with Patch SD*5.3*505 – PCMM Phase III Enhancements	REDACTED	REDACTED
01/15/2009	Manual updated to add elaboration 3.1 regarding transmission errors with Patch SD*5.3*534 – PCMM, PAIT and SCHEDULING FIXES.	REDACTED	REDACTED
04/01/2009	Manual updated to reflect the SCMC CHECK FTEE RPC has been changed to return a value of 99.1 if non-numeric information is entered in the combo box.	REDACTED	REDACTED
06/30/2009	Manual updated to mark /Detailed Patient Assignments – Assigned PC option obsolete with Patch SD*5.3*535 – ASSOCIATED CLINIC, ENROLLMENT PCMM FIXES.	REDACTED	REDACTED
02/19/2010	Screen captures edited to comply with SOP 192-352, Displaying Sensitive Data	REDACTED	REDACTED
09/22/2011	Manual updated with changes from Patch SD*5.3*504	REDACTED	REDACTED
06/19/2012	Manual updated (p. 8-10) for change made by Patch SD*5.3*539 - ELEC WAIT LIST, PAT APPT INFO TXN, PRIM CARE MGT MOD FIXES	REDACTED	REDACTED
07/24/2012	Manual updated with changes from Patch SD*5.3*581. It includes PCMM GUI version 1.3.0.27 (508 compliant). Added screenshot for FTEE and Panel Size Report. Added new GUI screenshots and description to Staff/FTEE Tab section. Updated Glossary with FTEE acronym and definition.	REDACTED	REDACTED
01/16/2014	Updated description of the PCMM status bar for patch SD*5.3*607.	REDACTED	REDACTED
06/2015	Removed HL7 instructions due to patch SD*5.3*624.	REDACTED	REDACTED

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Introduction

Overview of the Primary Care Management Module

The Primary Care Management Module (PCMM) was developed to assist VA facilities in implementing primary care. PCMM supports both primary care and non-primary care teams. Teams are groups of staff members organized for a certain purpose. The software allows you to setup and define a team, assign positions to the team, assign staff to the positions, assign patients to the team, assign patients to practitioners, and reassign patients from one team to another team.

Tools are provided with the software to facilitate the startup process. These tools use the site's data (where available) to automate the following tasks: identify patients to be assigned to primary care; assign patients to teams; assign patients to practitioners via team positions.

As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death notifications, inpatient notifications, consult notifications, team notifications, and automatic inactivation notifications. For each category, you can elect to have a position get messages for all patients on a team, only patients associated with that team position, or not send messages. You can also elect to have the messages for each category go to the position's preceptor. A preceptor is a position that acts as a supervisor/monitor for another position.

Numerous reports may be generated. Some of the reports are affected by site parameters. Although many of the reports may be printed through both the roll and scroll interface and the GUI (graphical user interface), most of the reports are only accessed through the roll and scroll interface. Patient-oriented outputs, practitioner-oriented outputs, and team-oriented outputs may be produced.

The *Mass Team/Position Discharge* option provides the ability to discharge large numbers of patients from a team or position at one time. This option is only available through the roll and scroll interface. A confirmation MailMan message is generated from the utilization of this option.

Primary care team/position assignment/unassignment may be accomplished through the GUI interface or through the *Primary Care Team/Posn Assign or Unassign* Scheduling option and through the *PC Assign or Unassign* action in the Appointment Management option.

Every patient must be assigned a primary care provider (PCP). A PCP can be an attending physician (MD or DO), a nurse practitioner (NP), or a physician assistant (PA).

In some instances, a patient may be seen regularly by someone who is not licensed as an independent practitioner per the Health Care Finance Agency (HCFA). For example, an Intern Physician cannot work independently as a PCP, but may be assigned as an “Associate Provider Providing Primary Care (AP/PCP)” in PCMM. When those positions are established, they must be assigned a preceptor. Once a patient assignment is made to a position with a preceptor link, you will not be able to inactivate the link without establishing another.

The PCMM business rules provide information on how some of the PCMM fields will be handled for team and team positions. These rules are not intended to be all encompassing, but to allow basic checking within the system to ensure data integrity.

508 Compliant GUI

Section 508 of the Rehabilitation Act Amendments of 1998 requires that when Federal agencies develop, procure, maintain, or use electronic and information technology, they shall ensure that the electronic and information technology allows persons with disabilities to have access to and use of information and data that is comparable to the access to and use of information and data by persons who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The Section 508 Accessibility Testing and Training Center (T&TC) was consulted and modifications to the GUI have been made to meet the requirements for 508 Compliance. The Primary Care Management Module GUI has been modified to allow screen readers, used by the visually impaired, to accurately interpret information on the screens. As a result, some buttons and boxes have been moved, replaced, or renamed and some screen titles have been modified. Although the developers have made every effort to retain the previous functionality, some functionality may have changed.

For more information on the VA 508 Compliance efforts, please visit the following website
REDACTED

Sensitive Information

To avoid displaying sensitive information regarding our patients and staff, the examples in this manual contain pseudonyms or scrambled data instead of real names. Our patients and staff will be referred to as PCMMPATIENT, ONE, PCMMPROVIDER, ONE, or PCMMUSER, ONE. Scrambled data is a series of random letters that replace a real name like AAADY, JWHTRE. Likewise real social security numbers (SSNs), real addresses and other personal identifiers are not used.

Windows Conventions

The startup, setup, and assignment functions for PCMM use a graphical user interface (GUI). You may refer to the Windows Conventions Section for an explanation of the windows elements and form buttons used by the module.

AutoLinks - (This functionality has been disabled.)

Autolinks connect a team with a set of wards, inpatient beds, practitioners, specialties, and clinics. **NOTE:** You cannot assign a patient to a primary care team or practitioner via AutoLinks. Autolinks will be used for inpatient teams by OE/RR.

Report Templates

The Query Template Utility is provided on the GUI side to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). The templates may then be used to print the reports in the future without having to make sort selections and category selections each time.

Non Primary Care Team set up for OIF OEF Case Management

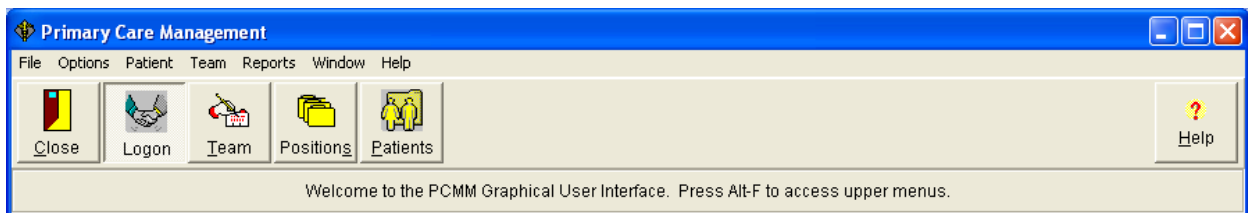
In order to track seriously ill Operation Iraqi Freedom/ Operation Enduring Freedom (OIF/OEF) patients, they are assigned to the Transition Patient Advocate (TPA) resource. This is tracked by setting up a non-primary care team with the TPA as a position on the team. Patients identified for this program are assigned to the team. Previously only primary care teams were transmitted to Austin. This feature includes altering how transmissions are screened and transmitted. This non-primary care team information is now transmitted to Austin along with the primary care teams.

For further information, see sections in this manual on Setting up OIF/OEF Team, Team Setup, and Position Setup.

Starting PCMM

When the Primary Care Module is started, the Menu and Toolbar below is displayed. Select either the FILE|VISTA LOGON menu bar command or the LOGON speed button to start.

Notice the status bar on the bottom of the screen consisting of seven segments. The first segment is used to display status messages when a SAVE action has successfully completed. The second segment indicates whether you are connected (if so, where) or not connected to VistA. The third shows the on/off status of the NUM LOCK key. The fourth displays insert/overwrite status but is not functional at this time. The fifth displays the current PCMM GUI version number. The sixth displays the current PCMM GUI patch number. The seventh contains the current time.



Click the OPTIONS|PREFERENCES menu bar command – then *Fonts* and/or *Background Colors* if you wish to change the font and/or background color used in the PCMM GUI.

Toolbar Speed buttons



Close Application

Disconnects from the network and closes the application. If the network connection is still active, you will get a confirmation request before closing the application.



Connect to/Disconnect from VistA

Logs on/off the network



Team Setup

Opens the Select Team dialog box/Primary Care Team Profile form



Position Setup

Opens the Select Team dialog box/Primary Care Team Position Setup form



Assign Patients

Opens the Patient Lookup dialog box



Show Associated Help

Opens the PCMM Help File

Logging On

When either the FILE|VISTA LOGON menu bar command or the Connect to VistA speed button is clicked, the VistA Sign-on dialog box opens. System information concerning where you are currently working is provided. Enter your access code followed by the tab button. Enter your verify code and click the OK button. (The PCMM option must be assigned to you. If you get a message stating you are not registered to use PCMM, contact your IRM Service.)

PCMM Parameters (PCMM Reassignment Mail Group)

Clicking the OPTIONS|PCMM PARAMETERS menu bar command opens the PCMM Parameters list box which displays the name of the PCMM Reassignment Mail Group. Members of this group receive the mail messages generated by the reassignment functionality. A new mail group, PCMM REASSIGNMENT, appears as the initial entry in this field.

If you wish to change the mail group, click on the down arrow. The current entry is deleted and a list of possible choices is displayed (a new mail group cannot be created here). Click on the correct entry and then the OK button. A confirmation box appears stating the parameter has been updated. Click the OK button in the confirmation box.

Tasks running in the background create the bulletins that it sends to this mail group

Background Tasks

PCMM Nightly Task [SCMC PCMM NIGHTLY TASK]

This task should be scheduled once a day. It reviews Patient Primary Care team position assignments and flags and inactivates patients as follows.

Step 1

Determine if the patient is new or established based on the length of time the patient has been assigned to the PCP position; if assigned to the position 12 months or less, then NEW; if assigned to the position more than 12 months, then ESTABLISHED.

All providers assigned to a particular position are evaluated. In this way any encounter kept for any of those providers (within their activity on the position) would count. The following rules apply.

- The same provider can be assigned, unassigned, assigned again, etc. Several segments of a local array are created for the same provider, if assigned more than once.
- If a patient is assigned to PC position, and a provider assigned to that position has a preceptor, then all appointments for that patient have to be matched with both the provider (preceptee) from the PC position the patient is assigned to and with the preceptor provider as well. The range of days to be evaluated for the preceptor, if any, will be the same as identified for the PC provider.
- If a patient is assigned to the PC preceptor position then only the provider(s) assigned to that position is (are) evaluated. The preceptor can have multiple preceptees assigned to the related positions, but it is not realistic to evaluate all of them.

Step 2

If a patient is NEW and it is the 11th month since being assigned to the position, check to see if the patient has any prior encounters with the PCP/APs in the preceding 11 months + 7 days and, if no encounters, flag for inactivation. Note that the look back should be for an encounter with any person that occupied the PCP/AP positions in the past 11 months + 7 days. On month 12, if still no encounters with PCP/AP in the preceding 12 months + 7 days, inactivate. The 7 days' time period will take into account the fact that the provider often sees the patient and then a day or two later assigns them to their panel.

Step 3

If a patient is ESTABLISHED, check to see if the patient has had any prior encounters with the PCP/AP in the preceding 23 months + 7 days and, if no encounters, flag for inactivation. On month 24, if still no encounters with PCP/AP in the preceding 24 months + 7 days, inactivate. Again, check for encounters with any persons that occupied the PCP/AP positions in the last 24 months + 7 days.

Note: Inactivation will take place either on the 15th or last day of the month, immediately after the calculated inactivation.

Flagging and unflagging patients for inactivation will take place each time SCMC PCMM NIGHTLY TASK is running. If any patients are flagged, then in addition to the current email messaging functionality, a message with the Subject line "Patient Scheduled for Inactivation from Primary Care Panel" will be sent to the PCMM PATIENT/PROVIDER INACTIVE Mail Group.

This task also identifies staff members who are improperly assigned as Primary Care Providers (PCP). See Inactivation Messages section for examples of the types of bulletins that are sent.

HL7 Transmission [SCMC HL7 TRANSMISSION]

Menu placed out of order.

Inactivation Messages

Inactivation messages are addressed to the PCMM PATIENT/PROVIDER INACTIVE mail group. PCMM Coordinators and others who will be monitoring inactivation should have membership in this group. Examples of the five Bulletins are provided on the following pages.

Patients Scheduled for Inactivation from Primary Care Panel

Subj: Patients Scheduled for Inactivation from PC Panel [#5404]
 12/20/05@09:43 33 lines
 From: POSTMASTER In 'IN' basket. Page 1

 Patients scheduled for inactivation from their Primary Care team and
 Primary Care Provider assignments appear below.

Flagging of primary care patients from a PCMM panel occurs each time this Inactivation Task is run.
 All providers assigned to a particular position are evaluated.
 If a patient is assigned to a PC position and the provider assigned to that position has a preceptor all encounters for the patient will be checked for matches with either the provider (preceptee) assigned to that position or the provider (preceptor) assigned as preceptor to that position.
 If a patient is assigned to the PC preceptor position then only the encounters with the provider assigned as preceptor will be evaluated.
 (a) If a patient is NEW and it is the 11th month since being assigned to the position, and the patient had no prior encounters with the PCP/APs in the preceding 11 months + 7 days then the patient is flagged for inactivation.
 (b) If a patient is ESTABLISHED and if the patient had no prior encounters with the PCP/AP in the preceding 23 months + 7 days the patient is flagged for inactivation.
 Inactivation will occur on the fifteenth and the last day of the month unless the patient has a completed appointment encounter with their current Primary Care Provider (PCP) or their Associate Primary Care Provider (AP) before that date. The patient may be reactivated to their previous PCP and PC team if they return for care.
 This message is generated each time when at least one new occurrence of flagging for inactivation takes place, and unconditionally on the 15th and the last day of a month.
 Patients scheduled for Inactivation from Primary Care panels

Patient Name	SSN	Provider	Team	Date Scheduled for Inactivation

INSTITUTION: ABCD VAMC				
PCMMPATIENT, ONE	2222	PCMMPROVIDER, EIGHT	BLUE TEAM	04/29/06
PCMMPATIENT, TWO	5555	PCMMPROVIDER, ELEVEN	BLUE TEAM	04/29/06
Enter message action (in IN basket): Ignore//				

Patients with Extended PCMM Inactivation Dates

Subj: Patients With Extended PCMM Inactivation Dates [#5405] 12/20/05@09:43

39 lines

From: POSTMASTER In 'IN' basket. Page 1

 By using the Extend Patient Inactivation Date option, these patients' PCMM inactivation dates are now 60 days from their original inactivation date. Inactivation occurs on the fifteenth and the last day of the month, unless the patient has a completed appointment encounter with their current Primary Care Provider (PCP) or their Associate Primary Care Provider (AP) before that date. The patient may be reactivated to their previous PCP and PC team if they return for care.

Patients with Extended PCMM Inactivation Dates

Patient Name	SSN	Provider	Team	Date Scheduled for Inactivation

INSTITUTION: ABCD VAMC
 PCMMPATIENT, FOUR 9999 PCMMPROVIDER, SEVEN BLUE TEAM 04/12/06

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

Patients Automated Inactivations from Primary Care Panels

Subj: Patients Automated Inactivations from PC Panels [#5406]

12/20/05@09:43 965 lines

From: POSTMASTER In 'IN' basket. Page 1

Patients inactivated from their Primary Care team and Primary Care Provider assignments appear below.

Inactivation occurs on the fifteenth and the last day of a month, unless the patient has a completed appointment encounter with their current Primary Care Provider (PCP) or their Associate Primary Care Provider (AP) before that date.

Inactivation of primary care patients from a PCMM panel occurs under the following circumstances:

(a) The patient expires

(b) Newly assigned patients (either newly-enrolled patients or patients who have been re-assigned to a different provider) who have not been seen by their PCP or Associate Provider (AP) and 12 months have passed since the time of assignment to that provider. This provides every PCP a 1-year grace period for seeing patients added to their panel (either newly-enrolled patients or patients transferred from a different panel) before they are inactivated. Patients must be seen by their PCP or AP within 12 months +7 days of being assigned, or they need to be inactivated from the PCP's panel.

(c) Established patients that have been assigned to the PCP's panel for more than 12 months, but have not been seen by their PCP or AP in the past 24 months +7 days need to be inactivated.

The patient may be reactivated to their previous PCP and PC team if they return for care.

Patients Automated Inactivation from Primary Care Panels

Patient Name	SSN	Provider	Team	Date Patient Inact	Reason Patient Inact

INSTITUTION: TEST VAMC					
PCMMPATIENT,ONE	9736	PCMMPROVIDER,ONE	TEST TEAM	08/08/05	NO APPT
PCMMPATIENT,NINETY	5894	PCMMPROVIDER,THIRTY	TEST TEAM	05/17/04	DECEASED

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

Primary Care Providers Scheduled for Inactivation

Subj: Primary Care Providers Scheduled for Inactivation [#5408] 12/20/05@09:44
64 lines

From: POSTMASTER In 'IN' basket. Page 1

WARNING- The following primary care staff will be automatically inactivated in PCMM software if a correct 'Person Class' and 'Provider Type' are not entered in the New Person File (#200) or their role and position in the 'Position Setup' window is not corrected to correspond with their 'Provider Type', 'Person Class' and the Primary Care business rules stated below:

1. Staff designated as Primary Care Providers (PCPs) in PCMM that are not an Attending physician (Attending MD or Attending DO), NP or PA, shall be inactivated from PCMM
2. Staff designated as Associate Providers (APs) in PCMM, that are not a Resident/Intern (Physician), NP or PA shall be inactivated in PCMM
3. All persons designated as an Associate Provider or Primary Care Provider, who do not have the correct 'Provider Type' and 'Person Class' entered in the New Person file (#200) in VistA, shall be inactivated from their Primary Care positions in PCMM six months after installation of patch SD*5.3*297 Date: JUL 12,2006.
4. Please contact your PCMM Coordinator or Information Systems to correct these problems

PRIMARY CARE PROVIDERS SCHEDULED FOR INACTIVATION

Provider's Name	Assoc Clinics	Team Position	Role	Person Class	# of Pts Assigned	Sch Inac Date
--------------------	------------------	------------------	------	-----------------	----------------------	------------------

INSTITUTION: TEST VAMC						
PCMMPROVIDER,ONE		INT AP	INT INTERN	(PHYSIC	Allopathic and 2	01/31/06
PCMMPROVIDER,SIX		INT AP	ADM ADMIN	COORDINA	Allopathic and 0	01/31/06
PCMMPROVIDER,TEN		PHYS AS	AD ADMIN	COORDINA	Physicians (M. 0	01/31/06

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

Primary Care Providers Inactivated

Subj: Primary Care Providers Inactivated [#5526] 12/20/05@10:28 6 lines
From: POSTMASTER In 'IN' basket. Page 1

PRIMARY CARE PROVIDERS INACTIVATED

Provider's Name	Assoc Clinics	Team Position	Role	Person Class	# of Pts Assigned	Inac Date
--------------------	------------------	------------------	------	-----------------	----------------------	--------------

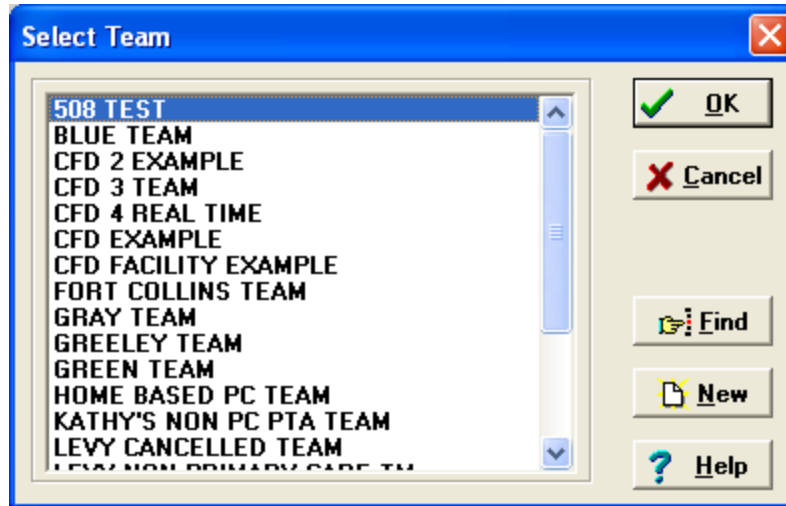
Enter message action (in IN basket): Ignore//

Team Setup

Create a New Team



1. Click on the Team Setup toolbar speed button or select the TEAM|SETUP menu bar command.



Select Team Dialog Box Information

Click on the desired entry to highlight it, and then click on the **OK** button to select. Clicking on **Cancel** closes the dialog box without selecting an entry. The scrollbar can be used to move up and down the list to find the desired entry. The **Find** button can be used to find a specific entry. If more than one match is found, the list box will clear and only the matching entries will be displayed. The **New** button allows you to enter a new team name. After entering the name, click on the OK button within the New Team dialog box.

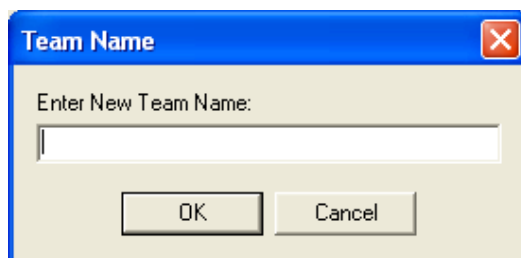
NOTES

Names are saved in all uppercase letters.

If the TEAM/ACTIVE ONLY menu bar command is selected, only active teams appear for selection.

2. Click the NEW button of the Select Team dialog box and enter the new team name (3-30 characters).

Create a New Team



A dialog box titled "Team Name" with a close button (X) in the top right corner. It contains a label "Enter New Team Name:" followed by a text input field. At the bottom are two buttons: "OK" and "Cancel".

3. The Primary Care Team Profile form appears. When initially setting up a team, information should be entered on the General and Settings tabs before clicking the SAVE button to store the data.

Note: Required fields are signified in this documentation by an asterisk * next to the field name. If all required fields are not completed, the SAVE button will not be enabled and you will not be able to save the information.

You may refer to the Windows Conventions Section for an explanation of the standard windows objects (i.e., list box, lookup box, etc.) and form buttons.

4. Enter the team information on the General and Settings tabs. (See following pages). When creating a new team, data entry is not required on the History tab. The History tab will not be available for a new team until the initial entry is saved. After you have entered all required data for the new team, click the SAVE button.

5. The popup calendar appears. Click on the date you wish to enter as the team activation date and click OK. The team has now been established.



A calendar dialog box titled "Enter Team Activation Date:". It shows the month of July 2007. The days of the week are listed at the top: Su, Mo, Tu, We, Th, Fr, Sa. The dates are arranged in a grid. The date 18 is highlighted with a red background. At the bottom are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11

If you wish to create positions on the team at this time, go back to the General Tab and click on the POSITIONS button. See the "Assign Positions to a Team" section under Team Setup for instructions.

Create a New Team

Primary Care Team Profile Screen General Tab

Field Descriptions

***Name (text box)**

The name of the team, 3-30 characters in length. If the new team name matches an existing team name, you will be so notified and asked for a different name.

Phone Number (text box)

Enter a phone number for the team, 3-20 characters.

Description (text box)

Any descriptive information specific to the team.

Current Activation (Label)

This label field displays the most recent activation date for the team.

Current Inactivation (Label)

This label field displays the most recent inactivation date for the team.

Positions (button)

This button takes you to the Team Positions Setup Screen.

Autolinks (button) (FUNCTIONALITY DISABLED)

Create a New Team

Primary Care Team Profile Screen Settings Tab

Team: APPLE

General **Settings** History

Purpose: PRIMARY CARE

Service: PROVIDER

Institution: CHEYENNE VAMC 442

Default Team Printer:

☒ Primary Care Team
☐ Restrict Consults
☐ Team Closed
☐ Auto-Assign to Team from Clinic
☐ Auto-Disch. from Team from Clinic

Team Assignments

Allowed:	Actual:
	0

Close Save Undo Help

Field Descriptions

*Purpose (drop down list)

The Purpose defines the role of the team. Primary care would be the usual choice but other kinds of teams may include Inpatient Ward, Community Care, etc.

*Service (lookup box)

This is the medical center service most closely associated with the team. It is an entry from the SERVICE file (#49) and includes clinical and non-clinical services.

*Institution (lookup box)

This is the entry from the INSTITUTION file (#4) associated with the team. It includes VA and non-VA institutions.

NOTE: Each division at a multidivisional facility has its own entry in the INSTITUTION file.

Default Team Printer (lookup box)

The PCMM reports do not use this field.

Create a New Team

Primary Care Team Profile Screen - Settings Tab

Primary Care Team (check box)

Click in this box if this team can be the primary care team for any patient. Even if the team's purpose is not primary care, it still may be able to act as a primary care team. Only a team that can act as a primary care team may have a primary care practitioner position assigned to it.

Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as "restrict consults" may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the Make Consult Appointment option. A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Team Closed (check box)

Click in this box to close the team. Additional patients should not be added to a team if it is designated as closed.

Auto-Assign to Team from Clinic (check box)

Click in this box to automatically assign the patient to a team when he is enrolled in a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the associated clinic is unique to one team. It is recommended that **both** the Auto-Assign and Auto-Discharge boxes be checked or **neither** be checked.

Auto-Discharge from Team from Clinic (check box)

Click in this box to automatically discharge the patient from a team when he is discharged from a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the patient has not been assigned to a team position.

Team Assignments (text box)

Allowed (numeric display)

This is the maximum number of patients that should be assigned to this team. Users are not prevented from adding additional patients to the team after the team's patient panel (list of patients) has reached this number. You should compare the current number of team assignments with the number allowed to balance team panel sizes.

Actual (numeric display)

This is the number of patients currently assigned to this team.

Create a New Team

Primary Care Team Profile Screen

History Tab

When creating a new team, no data entry is required on this tab.

Primary Care Team Profile

Team: 508 TEST

General Settings **History**

History Entries:

✓ ACTIVE - 06/08/2007

Effective Date:

Status:

Reason:

Ok Cancel ADD History Entry

Close Save Undo Help

Field Descriptions

History Entries (list box)

This display shows the history of status change dates for this team. Double clicking an entry **or** highlighting an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

*Effective Date

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/22/96).

*Status (drop down list)

This is the status of the team as of the effective date.

Create a New Team

Primary Care Team Profile Screen - History Tab

***Reason (drop down list)**

This is the reason for the change in the team's status.

OK (button)

Click OK to save changes.

Cancel (button)

Click Cancel to abort changes.

ADD History Entry (button)

Click ADD History Event to make changes in the activation/inactivation history.

Assign Positions to a Team

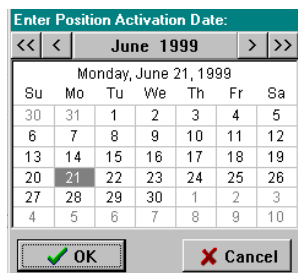
Note: The procedure for creating a resident position that is an associate provider has changed due to the fact the application now enforces the business rule regarding residents as PCPs. Note that before a resident position can be created as a PCP associate provider, the resident position must have a staff member assigned to the resident position and a preceptor assigned to the resident. To create a resident position, follow the steps in the Creating a Resident Position section which follows.

Creating a Team Position - General Instructions

If you have clicked on the Positions button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

1. Select the TEAM|POSITIONS menu bar command.
2. Select the team from the Select Team dialog box and click the OK button. Note that you cannot add a new position to an inactive team.
3. When the Primary Care Team Position Setup form appears, click Add New Position and the New Position dialog box appears. Enter the name of the new position and click OK. Positions that can act as preceptors should be created first so that they will exist for the team.
4. Enter the position information on the General, Settings, and Messages tabs (see following pages.) When initially creating a position, you must save the General tab information first before entering information in the other tabs. Information should then be entered in the General, Settings, and Messages tabs and click the SAVE button to store the data. No data entry is required on the History tab when creating a new position. All data displayed in the edit boxes applies to the position displayed in the forms header.
5. Required fields are signified in this documentation by an asterisk * next to the field name. You will not be allowed to save until all required fields have been completed. After you have entered all required data for the new position and clicked the SAVE button, this popup calendar appears. Click on the date you wish to enter as the position activation date and click OK. The position has now been established.

Position history record is automatically deleted if you click the Cancel button on the Enter Position Activation Date window when creating a new position.



Assign Positions to a Team

If you wish to assign a staff member to the position at this time, click on the STAFF button. See the “Assign Staff Member to a Position” section under Team Setup for instructions.

Creating a Resident Position

- 1.** Click Add New Position to create team position and enter the Position, Role, and Description. Click Save to save the position.
- 2.** Assign staff to the position: Click Staff tab then click Assign button.
- 3.** At the Staff lookup window, enter the last name of a Resident and click Search. A list of names will appear that match the last name you searched for. Click on the desired name and click OK to select it.
- 4.** Enter the Effective date if necessary (it defaults to today's date), enter the Status if necessary, and Status Reason if necessary. Do not enter FTEE at this time. Click Save to save position. Because a Resident can't be a PCP unless precepted, you will need to set up a Preceptor before you will be able to enter FTEE.
- 5.** Click Preceptor tab, then click Assign and select a Preceptor for this resident. Click Save to save preceptor. A NP or PA cannot be assigned as a preceptor for a resident (or intern).
- 6.** Click Settings tab, and click "Provides Primary Care as an Associate Primary Care Provider".
- 7.** Enter the number of patients allowed for this position and click Save to save Settings.
- 8.** Now you can enter the FTEE for this position. Click Staff/FTEE button. Click in FTEE edit box and enter the FTEE for this resident. Click Save.

Assign Positions to a Team

Primary Care Team Position Setup Screen

Primary Care Team Position Setup

TEAM SELECTED: **GREELEY TEAM**

Team Positions

☒ Show Active Only ☐ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE

General | Settings | Staff/FTEE | Preceptees | Associated Clinics | Messages | History | Patients

Position:

Role:

Description:

Beeper:

Position Current Information:

Activation Date:

Inactivation Date:

Preceptor Position Name:

Features of the Primary Care Team Position Setup Screen

- Shows active/inactive team positions
- Displays role, staff name, PCP status, preceptor status, position status, and FTEE
- Central Save/Cancel buttons used to save all changes regardless of which tab user is on
- Selected team position highlighted as user navigates through tabs
- *Team Selected* dropdown list allows users to change teams without closing this screen
- Allows sorting of positions by 7 column headings – to activate a sort, place cursor at the column heading and click

Assign Positions to a Team

Primary Care Team Position Setup Screen

Field Descriptions

Team Selected

Displays the name of the current team you are working on. To change teams, click the drop down box and select another team name.

Team Positions (list box)

Displays team positions. The list box shows all team positions or only those currently active based on the Positions to Show selection. In order to select a position listed in the Team Positions list box, click on the entry **or** click the entry and press the spacebar.

Show Active Only, Show All Positions (radio button)

You may choose to show all positions associated with this team or only the currently active positions.

Assign Positions to a Team

Primary Care Team Position Setup Screen General Tab

Primary Care Team Position Setup

TEAM SELECTED: GREELEY TEAM

Team Positions

☒ Show Active Only ☐ Show All Positions

Add New Position Inactivate Position

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
504 NEW TEST PHYSICIAN	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	YES	Active	
NEW PCP 504 TEST	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	
NURS G1	NURSE (RN)	No Current Staff Member	NO	NO	Active	
NURS G2	NURSE (LPN)	PCMMPROVIDER,ONE	NO	NO	Active	
PHARM G1	TEAM PHARMACIST	PCMMPROVIDER,FIVE	NO	NO	Active	
PROV G1	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FOUR	YES	NO	Active	.2

General Settings Staff/FTEE Preceptees Associated Clinics Messages History Patients

Position: 504 NEW TEST PHYSICIAN

Role: PHYSICIAN-PRIMARY CARE

Description: Test add position.

Beeper: 111-222-3333

Position Note: PHYSICIAN ATTENDING

Position Current Information:

Activation Date: MAY 01, 2008

Inactivation Date:

Preceptor Position Name:

Save Cancel Help Close

Position (text box)

The name of the position, 3-30 characters in length. If the new position name matches an existing position name on the current team, you will be so notified and asked for a different name.

Role (drop down list)

This is a list of standard roles to which the position is mapped.

Description (text box)

Descriptive information you may wish to add specific to the position.

Beeper (text box)

Beeper number for this position. This is a separate free text field. It is not linked to any other beeper or phone numbers in VistA.

Assign Positions to a Team

Primary Care Team Position Setup Screen - General Tab

Position Current Information (label)

Activation/Inactivation Date

These label fields may display the most recent activation/inactivation date for the selected position.

Preceptor Position Name

A preceptor is a position that acts as a supervisor/monitor for this position.

Note: *Physician Attending* is displayed when the highlighted physician is also a preceptor.

Assign Positions to a Team

Primary Care Team Position Setup Screen Settings Tab

Primary Care Team Position Setup

TEAM SELECTED: GREELEY TEAM

Team Positions

☒ Show Active Only ☐ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
504 NEW TEST PHYSICIAN	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	YES	Active	
NEW PCP 504 TEST	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	
NURS G1	NURSE (RN)	No Current Staff Member	NO	NO	Active	
NURS G2	NURSE (LPN)	PCMMPROVIDER,ONE	NO	NO	Active	
PHARM G1	TEAM PHARMACIST	PCMMPROVIDER,FIVE	NO	NO	Active	
PROV G1	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FOUR	YES	NO	Active	.2

General **Settings** Staff/FTEE Preceptor Associated Clinics Messages History Patients

Primary Care Provider and Preceptor Options

Will this physician be assigned as a Primary Care Provider? If yes click check box. If not, then un-check box below.

A. ☒ Provides Primary Care

Will this Primary Care physician also Precept/Supervise Primary Care Residents or other Associate Providers (APs)? If yes, check box below.

B. ☐ Precepts Associate Primary Care Providers.

Need help? Click here for further explanation on settings for this position...

Patients for Position

Allowed: 100

Actual: 0

User Class

Note: If disabled, this site does not use User Class

NOTE: If a provider other than an Attending, Resident/ Intern, PA or NP is selected, both boxes A and B will **not** be selectable.

Box “Allowed” under Patient for Position” is selectable for any position but its entry is required for the PCP staffed position and optional for other position.

Field Descriptions

Provides Primary Care (check box)

Only a Resident/Intern, NP, or PA shall be designated as an “Associate Provider” providing primary care.

Precepts Associate Primary Care Providers (check box)

Only an attending physician (MD or DO), NP, or PA can be designated a Precept to Associate Primary Care Providers.

Assign Positions to a Team

Primary Care Team Position Setup Screen - Settings Tab

Patients for Position (text box)

Allowed

The number of patients that should be assigned to this position. Users are not prevented from exceeding this number. It is required that you enter a value here before you can save Resident/Intern, NP, or PA as Primary Care Provider. Entry for all other positions that are not PCP ones are optional.

Actual

This is the number of patients that are currently assigned to this position.

User Class (lookup box)

This is the user class that must be used when selecting an individual to fill this position. This field may be disabled at some sites.

See documentation for Staff/FTEE Tab in the Assign Staff Member to a Position section.

See documentation for the Preceptor/Preceptee Tab in the Assign Preceptor to a Position section.

Assign Positions to a Team

Primary Care Team Position Setup Screen Associated Clinics Tab

The screenshot shows the 'Primary Care Team Position Setup' window. At the top, a dropdown menu shows 'TEAM SELECTED: GREELEY TEAM'. Below this, there are two radio buttons: 'Show Active Only' (selected) and 'Show All Positions'. To the right are two buttons: 'Add New Position' and 'Inactivate Position'.

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
PROV G5	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,TWO	YES	NO	Active	.1
PROV G6	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FOUR	YES	NO	Active	.1
PSA G1	PATIENT SERVICES ASSIST...	PCMMPROVIDER,FIVE	NO	NO	Active	
PSYCH G1	CLINICAL NURSE SPECIALIST	PCMMPROVIDER,TEN	NO	NO	Active	
SW G1	SOCIAL WORKER	PCMMPROVIDER,ONE	NO	NO	Active	
TEST ADD PHYSICIAN 504	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	

Below the table is a tabbed interface with the following tabs: General, Settings, Staff/FTEE, Preceptor, **Associated Clinics**, Messages, History, Patients. The 'Associated Clinics' tab is active, showing a list box with 'MHC FRANTZ - GREELEY' and two buttons: 'Add' and 'Delete'.

At the bottom of the window are four buttons: 'Save' (with a checkmark icon), 'Cancel' (with an X icon), 'Help' (with a question mark icon), and 'Close' (with a person icon).

If there is an existing clinic you wish to associate with this position, it should be entered here. The application provides for entering and saving multiple associated clinics for primary care providers and for associate primary care providers. The associated clinics will print on all PCMM reports with an associated clinic column or field.

The entire name of the associated clinic is displayed and remains on display after saving changes.

Assign Positions to a Team

Primary Care Team Position Setup Screen Messages Tab

Primary Care Team Position Setup

TEAM SELECTED: **GREELEY TEAM**

Team Positions

☒ Show Active Only ☐ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
PROV G5	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,TWO	YES	NO	Active	.1
PROV G6	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FOUR	YES	NO	Active	.1
PSA G1	PATIENT SERVICES ASSIST...	PCMMPROVIDER,FIVE	NO	NO	Active	
PSYCH G1	CLINICAL NURSE SPECIALIST	PCMMPROVIDER, TEN	NO	NO	Active	
SW G1	SOCIAL WORKER	PCMMPROVIDER,ONE	NO	NO	Active	
TEST ADD PHYSICIAN 504	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	

General Settings Staff/FTEE Preceptor Associated Clinics **Messages** History Patients

Death Notifications
☐ TEAM ☒ POSITION ☐ DO NOT SEND ☐ PRECEPTOR

Inpatient Notifications
☐ TEAM ☒ POSITION ☐ DO NOT SEND ☐ PRECEPTOR

Consult Notifications
☐ TEAM ☒ POSITION ☐ DO NOT SEND ☐ PRECEPTOR

Team Notifications
☐ TEAM ☒ POSITION ☐ DO NOT SEND ☐ PRECEPTOR

Automatic Inactivation Notifications
☐ TEAM ☐ POSITION ☒ DO NOT SEND ☐ PRECEPTOR

As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death, inpatient activity, consult activity, and team activity. Check the appropriate button/box for each type of notification.

When creating a new position, be sure to click the SAVE button after data entry on this tab to store all the information you have entered here and on the previous two tabs.

Assign Positions to a Team

Primary Care Team Position Setup Screen - Messages Tab

Field Descriptions

Death Notifications

Will notify the recipient of entry/deletion of the DATE OF DEATH field for a patient

Inpatient Notifications

Will notify the recipient of an inpatient admission/transfer/discharge for a patient

Consult Notifications

Will notify the recipient of either an appointment being made or enrollment in a clinic in which the patient was not previously enrolled

Team Notifications

Will notify the recipient of a patient's team activity (assignment, discharge, etc.)

Automatic Inactivation Notifications

The software automatically checks the “Do Not Send” option of the “Automatic Inactivations Notifications” line for all active positions in PCMM.

Button Descriptions

Team

If checked, the position will receive messages that are generated for all the team's patients.

Position

If checked, the position will receive messages that are generated only for those patients in the team associated with the position.

Do Not Send

If checked, the position will not receive messages.

Checkbox Description

Preceptor

For each activity type - if checked, will add the position preceptor to the recipient list. The boxes will be disabled for preceptor positions.

Assign Positions to a Team

Primary Care Team Position Setup Screen History Tab

When creating a new position, no data entry is required on this tab. The History Tab will not be available for a new position until the initial entry is saved.

Primary Care Team Position Setup

TEAM SELECTED: GREELEY TEAM

Team Positions

☒ Show Active Only ☐ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
PROV G5	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FOUR	YES	NO	Active	.1
PROV G6	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,ONE	YES	NO	Active	.1
PSA G1	PATIENT SERVICES ASSIST...	PCMMPROVIDER,FOUR	NO	NO	Active	
PSYCH G1	CLINICAL NURSE SPECIALIST	PCMMPROVIDER,TEN	NO	NO	Active	
SW G1	SOCIAL WORKER	PCMMPROVIDER,SIX	NO	NO	Active	
TEST ADD PHYSICIAN 504	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	

General Settings Staff/FTEE Preceptor Associated Clinics Messages **History** Patients

History Entries

Status	Date
ACTIVE	04/01/1999
INACTIVE	05/20/2003
ACTIVE	05/21/2003

Effective Date: 05/21/2003

Status: ACTIVE

Reason: POSITION DEFINITION

Field Descriptions

History Entries (list box)

This display shows the history of status change dates for this position. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

Assign Positions to a Team

Primary Care Team Position Setup Screen - History Tab

*Effective Date

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96).

*Status (drop down list)

This is the status of the position as of the effective date.

*Reason (drop down list)

This is the reason for the change in the position's status.

Save (button)

Click Save to save changes.

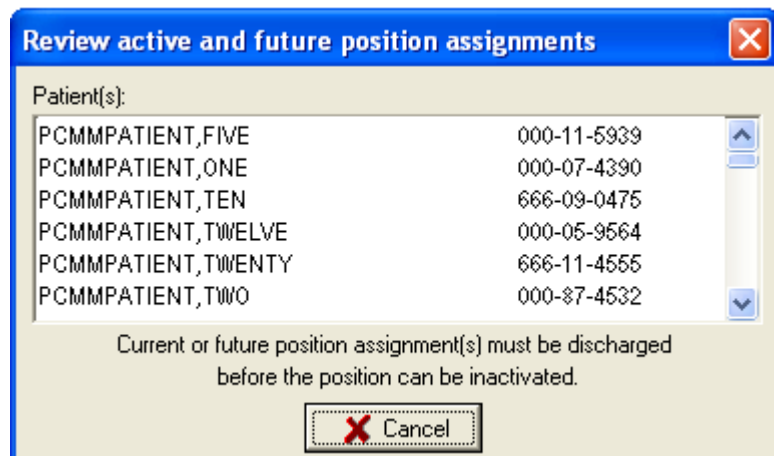
Cancel (button)

Click Cancel to abort changes.

Add Entry (button)

Click Add Entry to make changes in the activation/inactivation history.

NOTE: If you attempt to inactive a position that has members assigned, you will get this warning screen.



Assign Positions to a Team

Primary Care Team Position Setup Screen Patients Tab

Primary Care Team Position Setup

TEAM SELECTED: **GREELEY TEAM**

Team Positions

☒ Show Active Only ☐ Show All Positions

[Add New Position](#) [Inactivate Position](#)

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
SW G1	SOCIAL WORKER	PRMMPROVIDER,ONE	NO	NO	Active	
PSYCH G1	CLINICAL NURSE SPECIALIST	PCMMPROVIDER,TEN	NO	NO	Active	
PSA G1	PATIENT SERVICES ASSIST...	PCMMPROVIDER,SIX	NO	NO	Active	
PROV G6	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	
PROV G5	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	NO	Active	
PROV G4	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FIVE	YES	NO	Active	

General Settings Staff/FTEE Preceptor Associated Clinics Messages History **Patients**

Search For: [Search](#) SHOW: ☒ Patients - This Position ☐ All Patients On Team

Patient Name	SSN	Activation Date
PCMMPATIENT,FIVE	666-30-0051	03/16/2006
PCMMPATIENT,FOUR	666-90-1447	08/04/2006
PCMMPATIENT,NINE	000-91-8622	03/13/2006
PCMMPATIENT,ONE	000-42-7032	08/08/2006
PCMMPATIENT,SEVEN	666-35-2760	05/19/2006
PCMMPATIENT,SIX	000-60-7656	01/20/2006
PCMMPATIENT,TEN	000-99-5931	03/29/2006
PCMMPATIENT,TWELVE	666-36-6959	01/20/2006

Total patients assigned (This POSITION): **395** [Print](#)

[Save](#) [Cancel](#) [Help](#) [Close](#)

The Patients Tab displays a list of all patients assigned to the team or selected position. The total number of patients assigned to the team/position is provided as well as search capability for a particular patient.

Assign Positions to a Team

Primary Care Team Position Setup Screen Patients Tab

Field Descriptions

Search For: (lookup box)

Type the first three letters of the patient's last name in the box and press the Search button.

Show (radio button)

Displays all patients assigned to the team or only those patients assigned to the selected position depending on which radio button is checked.

Print (button)

Allows for printing of the patient list.

Assign Staff Member to a Position

(For positions that are NOT part of a preceptor link)

If you have clicked on the Staff button on the Primary Care Team Position Setup form, begin at Step 4. NOTE: You may also assign staff from the Team Position screen's Staff/FTEE tab.

1. Select the TEAM|ASSIGN STAFF menu bar command.
2. Select the team from the Select Team dialog box and click the OK button.
3. Select the position and click OK.
4. The Staff Assignment Add/Edit form appears. Click the ASSIGN button **or** choose the EDIT|ASSIGN MEMBER menu bar command.
5. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.
6. Enter FTEE for this position. It is required for a Primary Care Provider but optional for other staffed position.
7. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct. Close the form.
8. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button.

Assign Staff Member to a Position

(For positions that ARE part of a preceptor link)

1. Select the TEAM|POSITIONS menu bar command.
2. Select the team from the Select Team dialog box and click the OK button.
3. Select the position from the Primary Care Team Position Setup form and click the STAFF tab.
4. The Staff Assignment Add/Edit section appears. Click the Add Staff button.
5. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected. Staff members currently assigned to preceptor or precepted positions on the team may not be selectable depending on the type of position to which an assignment is being made.
6. Enter FTEE for this position if it is for a Primary Care Provider. Entry for other positions is optional. NOTE: On Resident or other positions which need a preceptor, the position must be staffed and have a preceptor assigned before the FTEE field will be enabled.
7. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct.
8. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button. If you inactivate a staff assignment for a position that is a current preceptor for another position and attempt to close the Staff Assignment Add/Edit form without creating a current staff assignment, your inactivation change will not be saved.

Assign Staff Member to a Position

Primary Care Team Position Setup Screen Staff/FTEE Tab

Primary Care Team Position Setup

TEAM SELECTED: BLUE

Team Positions

☒ Show Active Only ☐ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
BLUE BOY	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	YES	Active	
BLUE BOY PECEPTEE 1	RESIDENT (PHYSICIAN)	No Current Staff Member	YES	NO	Active	
BLUE NEW	PHYSICIAN-PRIMARY CARE	[REDACTED]	YES	YES	Active	
PHYS1	SOCIAL WORKER	[REDACTED]	NO	NO	Active	

General Settings **Staff/FTEE** Preceptor Associated Clinics Messages History Patients

Name: WILBUR, CHARLES V

Effective Date: 03/06/2012

Status: ACTIVE

Status Reason: EMPLOYEE ASSIGNED TO POSITION

FTEE: .9

Staff Assignment History

Status	Date	Staff Name
ACTIVE	03/06/2012	[REDACTED]

When staff, positions, or teams are inactivated, they automatically default to T-1 (today minus one day).

A Non-primary care provider position or a position on a non-primary care team is not required to enter FTEE when originally staffed.

FTEE entered on any staffed position cannot be removed, but can be changed to another value when accepted. A staffed position with FTEE entered can have the value deleted if the person is INACTIVATED. This position can be populated with FTEE again after the position is staffed.

Field Descriptions

Effective Date

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 03/16/12).

Assign Staff Member to a Position

Primary Care Team Position Setup Screen - Staff/FTEE Tab

Status (drop down list)

This is the status of the staff member as of the effective date.

Status Reason (drop down list)

This is the reason for the change in the staff member's status.

FTEE (Full-time Employee Equivalent)

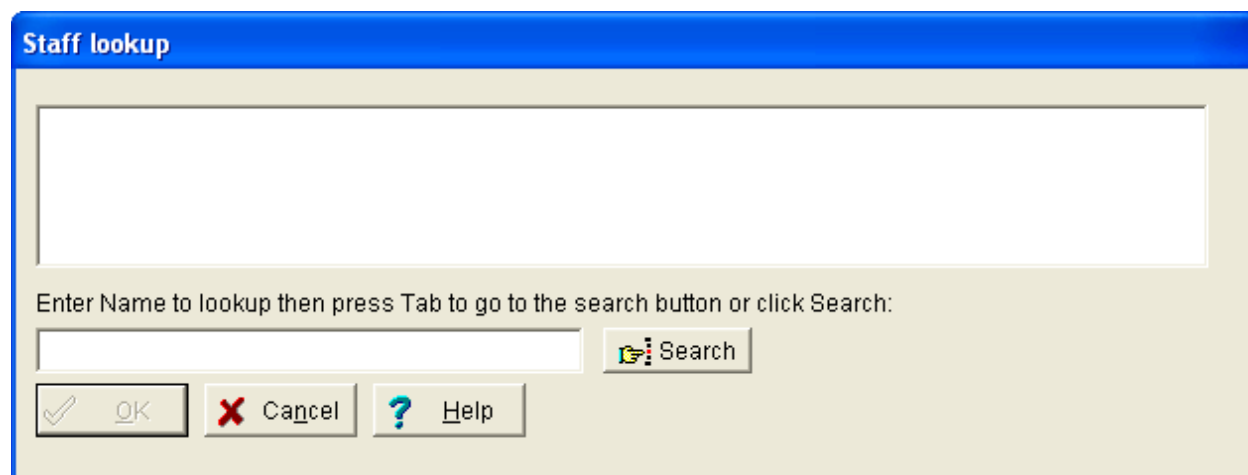
This is the decimal equivalent of the amount of time this position devotes to Patient Care. Entry of 0 for any staffed position is not allowed.

Staff Assignment History (list box)

This display shows the history of staff member assignment dates for the selected position. The displayed columns are Status (Active/Inactive), Date (date the position was Active/Inactive), and Staff Name. The last assignment date can be deleted using a right mouse click.

Add Staff (button)

Click on the Add Staff button to add a provider to this position. This will open the Staff Lookup Screen.

The screenshot shows a 'Staff lookup' dialog box with a blue title bar. Inside, there is a large empty rectangular box for displaying results. Below this box is a text prompt: 'Enter Name to lookup then press Tab to go to the search button or click Search:'. Under the prompt is a text input field. To the right of the input field is a 'Search' button with a magnifying glass icon. At the bottom of the dialog are three buttons: 'OK' with a checkmark icon, 'Cancel' with a red X icon, and 'Help' with a question mark icon.

Type the first three letters of the provider's last name in the Staff Lookup box and press the Search button. Select a provider from the list and click OK.

Assign Staff Member to a Position

Primary Care Team Position Setup Screen - Staff/FTEE Tab

Primary Care Team Position Setup

TEAM SELECTED: BLUE

Team Positions

Show Active Only Show All Positions Add New Position Inactivate Position

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
BLUE BOY	PHYSICIAN-PRIMARY CARE	No Current Staff Member	YES	YES	Active	
BLUE BOY PECEPTEE 1	RESIDENT (PHYSICIAN)	No Current Staff Member	YES	NO	Active	
BLUE NEW	PHYSICIAN-PRIMARY CARE		YES	YES	Active	
PHYS1	SOCIAL WORKER		NO	NO	Active	

General Settings **Staff/FTEE** Preceptor Associated Clinics Messages History Patients

Staff Assignment History

Warning

The total FTEE for this provider is 2 . The cumulative FTEE cannot be greater than 1.0 . By running the "FTEE" report sorted on provider only, one can view all FTEE entries for a provider.

OK

Status Reason: EMPLOYEE ASSIGNED TO POSITION

FTEE: 2.0

Prev Next Save Cancel Help Close

***NOTE:** PCMM prevents entry and transmission of provider FTEE values greater than one to AITC. The total FTEE for any role cannot be greater than one within an institution or within institutions with the same first three digits of the institution number. Entry of non-numeric data in the FTEE box will return a value of 99.1 when evaluated for FTEE compliance.

Assign Preceptor to a Position

Note: A staff member must be assigned to the preceptor position before a preceptor assignment can be made. Only positions eligible to be assigned a preceptor can have a preceptor assigned. The Add Preceptor button will be disabled if the position is not staffed or does not have the proper role to have a preceptor assigned. See the Business Rules section of this document for more information about preceptors.

1. Select the TEAM|POSITIONS menu bar command.
2. Select the team from the Select Team dialog box and click the OK button.
3. Select the position from the Primary Care Team Position Setup screen. Click the Preceptor tab.
4. Click the Add Preceptor button.
5. The Select Preceptor Position dialog box appears. Click on the desired preceptor position then click OK. Only names of designated preceptor positions for the current team will be available for selection.
6. The data fields on the Preceptor Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct.
7. To inactivate the current assignment, click the INACTIVATE button. Click the SAVE button. If you inactivate a preceptor for a position with current or future patient assignments and attempt to close the Preceptor Assignment Add/Edit form without creating a current preceptor assignment, your inactivation change will not be saved.

Assign Preceptor to a Position

Primary Care Team Position Setup Screen Preceptor/Preceptee Tab

Primary Care Team Position Setup

TEAM SELECTED: **GREELEY TEAM**

Team Positions

☒ Show Active Only ☐ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
PROV G2	NURSE PRACTITIONER	PCMMPROVIDER,TEN	YES	NO	Active	.8
PROV G3	NURSE PRACTITIONER	PCMMPROVIDER,FOUR	YES	NO	Active	.6
PROV G5	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,FIVE	YES	NO	Active	.1
PROV G6	PHYSICIAN-PRIMARY CARE	PCMMPROVIDER,THREE	YES	NO	Active	.1
PSA G1	PATIENT SERVICES ASSIST...	PCMMPROVIDER,TWO	NO	NO	Active	
PSYCH G1	CLINICAL NURSE SPECIALIST	PCMMPROVIDER,SIX	NO	NO	Active	

General | Settings | Staff/FTEE | **Preceptor** | Associated Clinics | Messages | History | Patients

Preceptor Position Name:

Effective Date:

Status:

Status Reason:

Preceptor Assignment History

Status	Date	Position Name

A Preceptors/Preceptees Tab has been added to the Primary Care Team Position Setup screen to display the preceptor for a position, or if the position is a preceptor, it displays a list of preceptees.

Preceptees may be reassigned to another preceptor so that a particular preceptor may be deactivated.

A preceptor position may be changed to a non-preceptor position as long as the preceptor does not have preceptees assigned to him/her and no patients are assigned to that position.

Assign Preceptor to a Position

Primary Care Team Position Setup Screen – Preceptor/Preceptee Tab

Field Descriptions

***Effective Date**

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 02/22/96).

***Status (drop down list)**

This is the status of the preceptor position assignment as of the effective date.

***Status Reason (drop down list)**

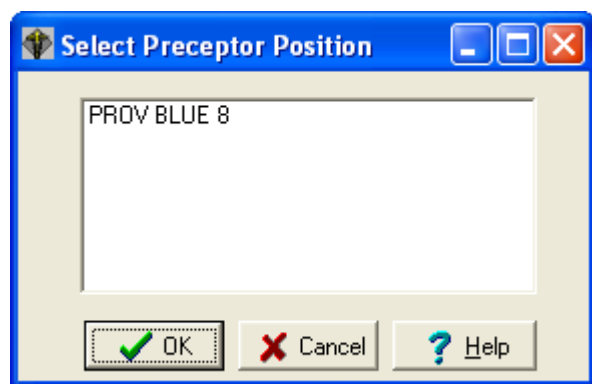
This is the reason for the change in the preceptor position assignment status.

Preceptor Assignment History (list box)

This display shows the history of preceptor position assignment dates for the selected position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

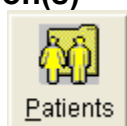
Add Preceptor (button)

Clicking the Add Preceptor button will open the Select Preceptor Position screen.



Select the desired preceptor from the list of Preceptors and click OK. This will activate the Preceptor Link.

Assign Single Patient to Team/Position(s)




1. Click on the Assign Patients toolbar speed button or select the PATIENT|PATIENT ASSIGNMENT menu bar command.




Patient Lookup

170 Patients found. Columns are name, date of birth, SSN. Use up/down keys to navigate list.

Patient Name, DOB, and SSN		
PCMMPATIENT,FIVE	8/21/1960	666-89-2356
PCMMPATIENT,ONE	11/15/1947	000-02-1932
PCMMPATIENT,TEN	*SENSITIVE*	*SENSITIVE*
PCMMPATIENT,TWELVE	10/22/1929	000-23-1123

Enter patient name:

PCMMPATIENT,FIVE  Search

 Select  Cancel  Help

2. The Patient Lookup dialog box appears. Type the patient name (last, first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button. Employee patients will display “sensitive” in the DOB and SSN columns. Accessing a sensitive patient record can trigger messages and bulletins being sent. If there is another patient with the same last name and same last four digits of the SSN as the selected patient, a warning message will appear to ensure you have selected the correct patient. If the selected patient requires a Means Test, a message will be displayed.

Assign Single Patient to Team/Position(s)

Patient: PCMMPATIENT,FIVE

ID: 666-89-2356
Primary Elig: SC LESS THAN 50%
Means Test:

DOB: 08/21/1960
Verified: DEC 13, 1988
MT Date:

Below is a list of assignments for this patient. Columns are Team name, * if they're a PCP, assigned date, and discharged date. Press tab or use mouse to go to list.

Team	PC	Assigned	Discharged
CFD EXAMPLE	*	05/04/2007	

Close Edit Team Assign Team Reactivate Help

3. The Select Patient-Team Assignment screen appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. All team assignments are displayed as the default. An asterisk in the PC column indicates the primary care team for this patient. Click the ASSIGN TEAM button and then select the team to which you wish to assign the patient.

A patient may be assigned to more than one panel on a given day as long as the patient un-assignment from all other primary care provider panels is completed on the same day.

4. The Team - Position Assignments screen appears. On the Team Assignment tab, check the Primary Care Team and Restrict Consults check boxes as appropriate. Change the Date Assigned if necessary. Click the SAVE button. Enter the information on the Position Assignments tab (see POSITION ASSIGNMENTS TAB).

Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen Team Assignment Tab

Team - Position Assignments

Team: GREELEY TEAM Patient: AAADTX,Y,CXEY Z

Team Assignment | Position Assignments

General Team Information:

Name: GREELEY TEAM

Purpose: PRIMARY CARE

Institution: GREELEY CBOC

Service: MEDICAL SERVICE

Availability:

Closed: NO

Assigned: 1318

Maximum: 2056

Assigned Date: 03/10/2005

Discharge Date: 10/17/2008

Discharge Reason: Requested by Patient

Save

Cancel

Can Provide Primary Care?

☐ Primary Care Team for this Patient?

Has Multiple PCPs?

☐ Patient Has Multiple PCPs

Restrict Consults for Team?

☐ Restrict Consults for this Patient?

Close Help

Field Descriptions

Dates

*Assigned

The date the patient is assigned to the team. Default will be today.

Discharged

The date the patient is discharged from the team.

Discharge Reason (Drop down list)

Click this to select a reason when discharging a patient. **NOTE:** Automatic reasons (Deceased and Automatic Inactivation) are set during automatic discharges and are not selectable by the user.

Primary Care Team for this Patient? (Check box)

Check this box if this team will be the primary care team for this patient. Patients may have only one team designated as their primary care team.

Patient Has Multiple PCPs (Check box)

Check this box if the patient is allowed to have multiple PCPs. Be sure to follow the Business Rules for allowing multiple PCPS.



Restrict Consults for this Patient? (Check box)

Check this box if you wish to restrict consults for this particular patient. This is only applicable to teams where consults are not restricted for the entire team.

Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen

Position Assignments Tab


Team - Position Assignments


Team: BLUE TEAM
Patient: AAADTX,Y,BHQDY Q

Team Assignment
Position Assignments

Below are a list of Team Position assignments. The columns are * if it's a primary care team assignment, team member name, team position, and an * if the position is a preceptor. Press tab or use mouse to go to list.

PC	Team Member	Position	Preceptor
<div> <div></div> <div></div> </div>			

Save

Cancel

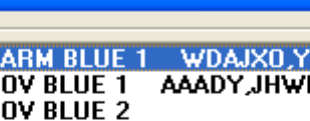
Assign

Close

Help

The Position Assignments tab displays existing assignments to positions on the selected team. The PC column will contain an asterisk to identify primary care provider positions and an x to identify associate provider positions. Other data provided includes position name, standard role, staff member, and whether or not the position can act as a preceptor.

1. Click the ASSIGN button. From the Select Position dialog box, choose the position you are assigning the patient to and click OK.



Select Position:

PHARM BLUE 1	WDAJXD YDJXAH X
PROV BLUE 1	AAADY JHWERT I
PROV BLUE 2	
PROV BLUE 3	NRSSDYF AHTADH C
PROV BLUE 4	SHIYHB JLUXA G
PROV BLUE 5	MRKLULB ZXYL L
PROV BLUE 6	TEDHTMHY ZDAGXUI H
PROV BLUE 7	EYAXP LYY J
PROV BLUE 8	

OK

Cancel

Find

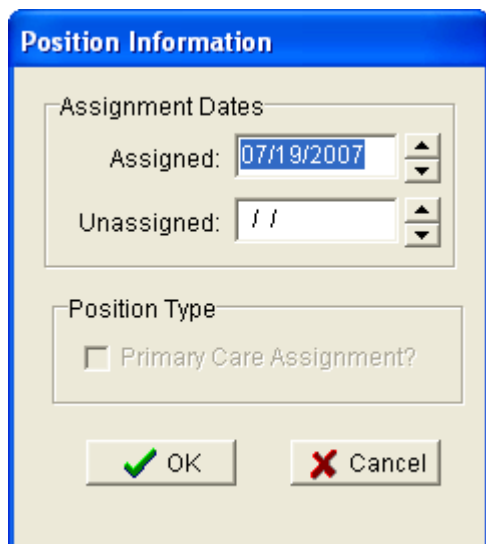
Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen - Position Assignments Tab

2. The Position Information dialog box appears. Edit the assignment date and position type, if necessary. Click OK. Then click the SAVE button on the Position Assignments tab.

If the position has been associated with a clinic and the patient is not already enrolled there, you will now be asked if you want to enroll the patient in that clinic. If you answer YES, you will be asked if this is an outpatient enrollment. If you answer NO to outpatient enrollment, the enrollment will automatically be an ambulatory care enrollment.

3. If you wish to assign this patient to another position on this team, click the right mouse button and select “new position”. See Step 2.



The image shows a 'Position Information' dialog box with a blue title bar. It contains two main sections: 'Assignment Dates' and 'Position Type'. In the 'Assignment Dates' section, there are two date pickers: 'Assigned:' with the date '07/19/2007' and 'Unassigned:' with the date '1/1'. In the 'Position Type' section, there is a checkbox labeled 'Primary Care Assignment?'. At the bottom of the dialog box are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

*Assignment Dates

Enter the date you are assigning the patient to the position.

Position Type

Primary Care Assignment? (check box)

Check the box if this is a primary care assignment.

Assign Single Patient to Team/Position(s)**Team – Position Assignments Screen - Position Assignments Tab**

Team - Position Assignments

Team: BLUE TEAM Patient: AAADTX, BHQDY Q

Position Assignments

Below are a list of Team Position assignments. The columns are * if it's a primary care team assignment, team member name, team position, and an * if the position is a preceptor. Press tab or use mouse to go to list.

PC	Team Member	Position	Preceptor
	AAADY, JHWERT I	PROV BLUE 1	

Save Cancel Assign

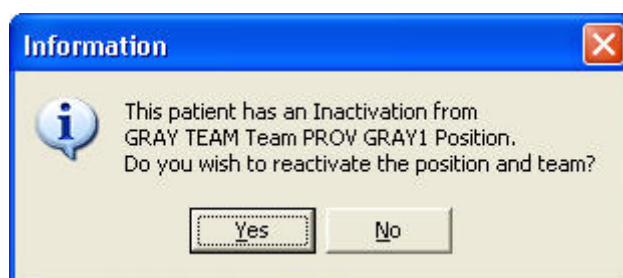
Close Help

Patient Reactivation of an Automatically Inactivated Patient

The Reactivate button will be enabled if the patient had an automatic inactivation by the system. It is provided for easy reactivation of a patient to their previous team and position.

Team	PC	Assigned	Discharged
GRAY TEAM	*	05/16/2000	04/07/2006

1. Click Reactivate button.
2. A message box will appear showing the previously deactivated team and position and will confirm that you would like to reactivate the patient to the previous team and position (see image below).



3. Click Yes to confirm and reactivate the patient. This reactivates the original team and position assignment, keeping the original assigned date and removing the discharged date to reactivate the old assignment.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|TEAM ASSIGNMENT menu bar command.
2. Select a team through the Select Team To Assign To dialog box.
3. The Multiple Patient Assignments to Team form appears. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.
4. From the *Select Patients by* drop down list, choose the method of patient selection. If your selection method is *PC Assignment with No Team*, click the GET LIST button and then enter the effective date. Go to Step 6.
5. Select the *clinic/stop code/clinic appointment/team* from the drop down list.

If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method was stop code or clinic appointment, you will be asked for a date range.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

6. Make your patient selections by clicking on the name.

NOTE: The lists of patients, which currently appear in the Available to Assign and New Assignments boxes, may be printed to a local (non-VistA) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

7. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Include Selected >

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Include All >>

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

< Exclude Selected

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

<< Exclude All

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

8. Click the SAVE button. The selected patients are now assigned to the selected team.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

Field Descriptions

Select Patients by (drop down list)

You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, or pc assignment with no team.

Select Clinic {patient selection method} (drop down list)

Choose the clinic, stop code, clinic appointment, or team from which you wish to assign patients.

Available to Assign (list box)

Contains names of patients who are available to be assigned to the selected team.

Next Block (button)

The Available to Assign list box contains a maximum of 200 names in the displayed block. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

New Assignments (list box)

Contains names of patients who will be assigned to the selected team once the SAVE button is clicked.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

Entries Found (numeric display)

Displays the total number of entries found matching the selection criteria.

Entries Processed (numeric display)

Once the assignment is made and saved, the number of entries processed will be displayed.

Primary Care Assignment (check box)

Check this box if this team is to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|POSITION ASSIGNMENT menu bar command.
2. Select a team through the Select Team To Assign To dialog box.
3. Select a position through the Select Position in Team dialog box.
4. The Multiple Patient Assignments to: {Position in Team} form appears. Check the Primary Care Assignment check box on the bottom of the form, if applicable.
5. From the *Select Patients by* drop down list, choose the method of patient selection. If your selection method is *PC Assignment with No Team*, click the GET LIST button and then enter the effective date. Go to Step 7.
 - 5a. If you choose the “position enrollment” method of patient selection, the Select Team dialog box will appear.
 - To assign patients from one position to another position on the same team, select the team chosen at Step 2.
 - To assign patients from a position on one team to a position on another team, select the team **from** which you wish to assign patients.
6. Select the *clinic/stop code/clinic appointment/team/position* from the drop down list.

If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method is stop code or clinic appointment, you will be asked for a date range.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

7. Make your patient selections by clicking on the name.

NOTE: The lists of patients which currently appear in the Available to Assign and New Assignments boxes may be printed to a local (non-VistA) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

8. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Include Selected >

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Include All >>

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

< Exclude Selected

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

<< Exclude All

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

9. Click the SAVE button. The selected patients are now assigned to the selected position.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

Field Descriptions

Select Patients by (drop down list)

You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, position enrollment, or pc assignment with no team.

Select {patient selection method} (drop down list)

Choose the clinic, stop code, clinic appointment, team, or position from which you wish to assign patients.

Available to Assign (list box)

Contains names of patients who are available to be assigned to the selected position.

Next Block (button)

The Available to Assign list box contains a maximum of 200 names in the displayed block. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

New Assignments (list box)

Contains names of patients who will be assigned to the selected position once the SAVE button is clicked.

Entries Found (numeric display)

Displays the total number of entries found matching the selection criteria.

Entries Processed (numeric display)

Once the assignment is made and saved, the number of entries processed will be displayed.

Primary Care Assignment (check box)

Click in this box if the position you are assigning to is a primary care position for these patients. The position must be able to provide primary care.

Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|TEAM REASSIGNMENT menu bar command.
2. The Multiple Patient Team Reassignment form appears. Click on the *Options [PC Assign]* tab. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.
3. Click on the *Reassign* tab. From the *FROM Team* drop down list, select the team **from** which you are reassigning patients. From the *TO Team* drop down list, select the team **to** which you are reassigning patients. Patient names will appear in the *Available to Assign* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.
4. Make your patient selections by clicking on the name.
5. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.
 - Double clicking on an entry
 - Click and drag
 - Using the buttons

Include Selected >

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Include All >>

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

< Exclude Selected

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

<< Exclude All

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

6. Click the SAVE button. The selected patients are now reassigned to the selected team. Information concerning patients who were not reassigned will be provided to the user via a new MailMan message.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Multiple Patient Team Reassignment Screen

The screenshot shows a software window titled "Multiple Patient Team Reassignment". It features a tabbed interface with two tabs: "Reassign" and "Options [PC Assign]". The "Options" tab is currently selected. The main area of the window is a large, empty rectangular box. To the right of this box, there are two buttons: "Close" (with a red 'X' icon) and "Help" (with a question mark icon). Below these buttons is a section titled "Entries Information" which contains two text boxes: "Found: 3307" and "Processed: 0".

Field Descriptions

Entries Information

Found (numeric display)

Displays the total number of entries found matching the selection criteria.

Processed (numeric display)

Once the assignment is made and saved, the number of entries processed will be displayed.

NOTE: When utilizing multiple patient reassignment, the system refreshes the patient count incrementally in the team setting. You may not see all the patients reassigned immediately. The system will continually refresh until all selected patients have been transferred and the appropriate numbers are displayed.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Multiple Patient Team Reassignment Screen Options [PC Assign] Tab

The screenshot shows a software window titled "Multiple Patient Team Reassignment" with a blue header bar. Below the header, there are two tabs: "Reassign" and "Options [PC Assign]". The "Options [PC Assign]" tab is selected. The main area of the window is divided into two sections. On the left, under the heading "Options", there are two checkboxes: "Primary Care Assignment" (which is checked) and "Restrict Consults" (which is unchecked). On the right, there is a section titled "Entries Information" containing two labels: "Found:" with a value of "3307" and "Processed:" with a value of "0". At the top right of the window, there are two buttons: "Close" (with a red X icon) and "Help" (with a question mark icon).

Options

Primary Care Assignment (check box)

Check this box if you want the *To* team to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)

Click in this box to prevent users from making consult appointments to clinics in which the *To* team's patients are not enrolled. Patients who are listed as "restrict consults" may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Multiple Patient Team Reassignment Screen Reassign Tab

From Team (drop down list)

Select the team from which you wish to reassign patients.

To Team (drop down list)

Select the team to which you wish to reassign patients.

Available to Assign (list box)

Contains names of patients who are available to be reassigned to the selected *To* team.

Next Block (button)

The Available to Assign list box contains a maximum of 200 names in the displayed block, if the NEXT BLOCK button is enabled, you may click it to see the next block of names.

New Assignments (list box)

Contains names of patients who will be reassigned to the selected *To* team once the SAVE button is clicked.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|POSITION REASSIGNMENT menu bar command. The Multiple Patient Position Reassignment form appears.
2. Click on the *Options [PC Assign]* tab. Check the desired radio button under *Assignment Status* and select the date/date range under *Assignment Dates* if applicable. Check the *Primary Care Assignment* check box if applicable.
3. Click on the *Reassign* tab. Select a team from the *FROM Team* drop down list and a position from the *FROM Position* drop down list. Patient names will appear in the *Available to Assign* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.
4. Select a team from the *TO Team* drop down list and a position from the *TO Position* drop down list.
5. Make your patient selections by clicking on the name.
6. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.
 - Double clicking on an entry
 - Click and drag
 - Using the buttons

Include Selected >

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Include All >>

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

< Exclude Selected

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

<< Exclude All

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

7. Click the SAVE button. The selected patients are now reassigned to the selected team and position. Information concerning patients who were not reassigned will be provided to the user (and to members of the PCMM Reassignment Mail Group) via a new MailMan message.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen

Multiple Patient Position Reassignment

Reassign Options [PC Assign]

Assignment Status

☒ Assigned

☐ Discharged

☐ Both

Assignment Dates

From: 07/19/2007

To: 07/19/2007

Options

☒ Primary Care Assignment

Entries Information

Found: 0

Processed: 0

Close

Help

Field Descriptions

Entries Information

Found (numeric display)

Displays the total number of entries found matching the selection criteria.

Processed (numeric display)

Once the assignment is made and saved, the number of entries processed will be displayed.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen Options [PC Assign] Tab

The screenshot shows a software window titled "Multiple Patient Position Reassignment" with a blue title bar and standard Windows window controls. Inside the window, there are two tabs: "Reassign" and "Options [PC Assign]". The "Options [PC Assign]" tab is active. The main area of the window is divided into several sections. On the left, there is an "Assignment Status" section with three radio buttons: "Assigned" (selected), "Discharged", and "Both". To the right of this is an "Assignment Dates" section with "From" and "To" date pickers, both showing "07/19/2007". Below these is an "Options" section with a checked checkbox for "Primary Care Assignment". On the right side of the window, there is a "Close" button with a red X icon, a "Help" button with a question mark icon, and an "Entries Information" section. The "Entries Information" section contains two labels: "Found:" and "Processed:", each followed by a text box containing the number "0".

Field Descriptions

Assignment Status (radio button)

Select the assignment status for the list of patients which will appear in the FROM Position list box.

Assigned - Patients currently assigned to the selected FROM position.

Discharged - Patients who have been discharged from the selected FROM position.

Both - Patients in both the Assigned and Discharged categories.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen - Options [PC Assign] Tab

Assignment Dates

Select the date or date range for the selected assignment status.

If Assignment Status is

Assigned	Date range will not be enabled.
Discharged	Both <i>from</i> and <i>to</i> date fields will be enabled.
Both	Only <i>from</i> date field will be enabled. Range will be to current date.

Options

Primary Care Assignment (check box)

Click in this box if the position you are assigning to is a primary care position for these patients.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen Reassign Tab

The screenshot shows a software window titled "Multiple Patient Position Reassignment" with a blue header bar. Below the header, there are two tabs: "Reassign" (selected) and "Options [PC Assign]". The main area is divided into several sections. On the left, there are two dropdown menus labeled "From Team" and "From Position". To their right are two more dropdown menus labeled "To Team" and "To Position". Below these, there is a large list box labeled "Available to Assign". To the right of this list box are four buttons: "Include Selected >", "Include All >>", "< Exclude Selected", and "<< Exclude All". At the bottom of the "Available to Assign" section is a button labeled "Next Block". To the right of the "Available to Assign" section is another large list box labeled "New Assignments". Below this list box are two buttons: "Save" and "Cancel". On the far right, there is a "Close" button with a red X icon and a "Help" button with a question mark icon. Below these buttons is a section titled "Entries Information" which contains two labels: "Found:" followed by a text box containing the number "0", and "Processed:" followed by a text box containing the number "0".

Field Descriptions

From Team (drop down list)

Select the team from which you wish to reassign patients.

From Position (drop down list)

Select the position from which you wish to reassign patients.

To Team (drop down list)

Select the team to which you wish to reassign patients.

To Position (drop down list)

Select the position to which you wish to reassign patients.

Available to Assign (list box)

Contains names of patients who are available to be reassigned to the selected *To* team and position.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen - Reassign Tab

Next Block (button)

The Available to Assign list box contains a maximum of 200 names in the displayed block, if the NEXT BLOCK button is enabled, you may click it to see the next block of names.

New Assignments (list box)

Contains names of patients who will be reassigned to the selected *To* team and position once the SAVE button is clicked.

Setting up OIF/OEF Teams

To assist in the timely treatment of seriously ill Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF) veterans, the VA has established Transition Patient Advocates (TPA) in most VA facilities. Facilities are setting up PCMM non-primary care teams to help identify and track these OIF/OEF patients.

When setting up the new OIF/OEF, follow the same procedure for setting up the Primary Care teams. There may be only one OIF/OEF team per site.

Select OIF/OEF as the Team Purpose and uncheck the Primary care box.

The screenshot shows the 'Primary Care Team Profile' dialog box with the 'Settings' tab selected. The 'Team' is 'OIF OEF'. The 'Purpose' is 'OIF OEF', 'Service' is 'MEDICAL SERVICE', and 'Institution' is 'ASHEVILLE VAMC 637'. The 'Default Team Printer' is empty. The 'Team Assignments' section shows 'Allowed: 5000' and 'Actual: 3'. The 'Settings' section has four checkboxes: 'Primary Care Team' (unchecked), 'Restrict Consults' (unchecked), 'Team Closed' (unchecked), and 'Auto-Assign to Team from Clinic' (checked). The 'Auto-Disch. from Team from Clinic' checkbox is also present but unchecked. The bottom of the dialog has buttons for 'Close', 'Save', 'Undo', and 'Help'.

Team Assignments	
Allowed:	Actual:
5000	3

Fill in the other required team fields with the information appropriate for your site.

Setting up OIF/OEF Teams

Enter the names of the positions according to your facility's instructions and select the appropriate role from the list box.

Only the following roles are allowed on the OIF/OEF team.

- OIF/OEF Transition Patient Advocate (TPA)
- OIF/OEF Clinical Case Manager (CCM)
- OIF/OEF Program Manager (PM)

Primary Care Team Position Setup

TEAM SELECTED: **OIF OEF**

Team Positions

☐ Show Active Only ☒ Show All Positions

Position	Role	Staff Name	PCP	Precepts	Status	FTEE
TPA	OIF OEF TRANSITION PATIE...	PCMMPROVIDER, ONE	NO	NO	Active	
PROG MGR	OIF OEF PROGRAM MANAGER	PCMMPROVIDER, TEN	NO	NO	Active	
CCM	OIF OEF CLINICAL CASE MA...	PCMMPROVIDER, SIX	NO	NO	Active	

General | Settings | Staff/FTEE | Preceptor | Associated Clinics | Messages | History | Patients

Position:

Role:

Description:

Beeper:

Position Current Information:

Activation Date:

Inactivation Date:

Preceptor Position Name:

Fill in the other required position fields with the information appropriate for your site.

Edit an Existing Team

Team Setup



1. Click on the Team Setup toolbar speed button or select the TEAM|SETUP menu bar command.
2. Select the team you wish to edit from the Select Team dialog box and click the OK button.
3. Enter the correct information on the General or Settings tabs of the Primary Care Team Profile form. Click the SAVE button after editing for the data to be stored.
4. To inactivate the selected team, first click the ADD button on the History tab. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information. A warning message appears when attempting to inactivate a team with active assignments on or after the inactivation date.

Position Setup

These steps cover editing of an existing position. If you are assigning a new position to a team, see “Assign Positions to a Team” under Team Setup.



1. Click on the Position Setup toolbar speed button or select the TEAM|POSITIONS menu bar command.
2. Select the team whose positions you wish to edit from the Select Team dialog box and click the OK button.
3. Double click the position you wish to edit from the Teams Position list box on the Primary Care Team Position Setup form. Enter the correct information on the General, Settings, or Messages tabs. Click the SAVE button after editing for the data to be stored.
4. To inactivate the selected position, first click the ADD button on the History tab. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information. A warning message appears when attempting to inactivate a position with active assignments on or after the inactivation date.

Staff Assignment

(For positions that are NOT part of a preceptor link)

These steps cover editing where a staff member has already been assigned to a position. If you are initially assigning a staff member to a position, see “Assign Staff Member to a Position (For positions that are NOT part of a preceptor link)” under Team Setup.

1. Select the TEAM|ASSIGN STAFF menu bar command.
2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.
3. Select the position you want to edit from the Select Position in Team dialog box and click OK. The Staff Assignment Add/Edit form appears.
4. To inactivate the current assignment, click the INACTIVATE button **or** click the right mouse button and select “Inactivate Current Member” **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button.
5. To assign a new staff member, click the ASSIGN button **or** click the right mouse button and select “Assign Member” **or** choose the EDIT|ASSIGN MEMBER menu bar command.
6. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.
7. Entry of FTEE for this position is required if it is the PCP position, otherwise it is optional.
8. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

Staff Assignment

(For positions that ARE part of a preceptor link)


These steps cover editing where a staff member has already been assigned to a position that is part of a preceptor link. If you are initially assigning a staff member to a position, see “Assign Staff Member to a Position (For positions that ARE part of a preceptor link)” under Team Setup.

1. Select the TEAM|POSITIONS menu bar command.
2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.
3. Select the position you want to edit from the Primary Care Team Position Setup form and then click on the Staff/FTEE button. The Staff Assignment Add/Edit form appears.
4. To inactivate the current assignment, click the INACTIVATE button **or** click the right mouse button and select “Inactivate Current Member” **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button. If you inactivate a staff assignment for a position that is a current preceptor for another position and attempt to close the Staff Assignment Add/Edit form without creating a current staff assignment, your inactivation change will not be saved.
5. To assign a new staff member, click the ASSIGN button **or** click the right mouse button and select “Assign Member” **or** choose the EDIT|ASSIGN MEMBER menu bar command.
6. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected. Staff members currently assigned to a preceptor or precepted positions on the team may not be selectable depending on the type of position to which an assignment is being made.
7. Entry of FTEE for this position. is required if it is the PCP position, otherwise it is optional.
8. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

Single Patient Assignment

These steps cover editing where a patient has already been assigned to a team and/or position. If you are initially assigning a patient to a team/position, see “Assign Single Patient to Team/Position(s)” under Team Setup.



1. Click on the Assign Patients toolbar speed button  or select the PATIENT|PATIENT ASSIGNMENT menu bar command.

2. The Patient Lookup dialog box appears. Type the patient name (last, first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button. Employee patients will display “sensitive” in the DOB and SSN columns. Accessing a sensitive patient record can trigger messages and bulletins being sent. If there is another patient with the same last name and same last four digits of the SSN as the selected patient, a warning message will appear to ensure you have selected the correct patient. If the selected patient requires a Means Test, a message will be displayed.

3. The Select Patient-Team Assignment form appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. An asterisk in the PC column indicates the primary care team for this patient. If the patient is assigned to more than one team, click on the team for which you wish to edit patient assignment. Click the EDIT TEAM button.

4. Team Assignment - If necessary, edit the primary care team and restrict consults fields on the Team Assignment tab and click the SAVE button. To discharge a patient from a team, enter the date of discharge. Tab off the field and click the SAVE button. If the patient is assigned to positions on the team, the Review Active Positions dialog box will now appear. Clicking the DISCHARGE button will automatically enter the same discharge date for the associated active positions. Clicking the CANCEL button will cause the just entered date of discharge to be deleted. This action prevents patients being actively assigned to a position without having a team assignment

5. Position Assignment - To unassign an existing position assignment, double click on the position on the Position Assignment tab. The Position Information dialog box appears. Enter the unassigned date and click OK. Click the SAVE button. (History for this position assignment will remain.)

NOTE: If a patient has been assigned to a position in error (data entry error), the following steps should be taken. Click on the position. Select the EDIT|POSITION ASSIGNMENT|DELETE menu bar command. Confirm the deletion by clicking the OK button. You must hold the SC PCMM DELETE security key to perform this action. (History for this position assignment will be deleted.)

Creating Autolinks (functionality disabled)

If you have clicked on the Autolinks button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

1. Select the TEAM|TEAM AUTOLINKS menu bar command.
2. Select a team through the Select Team Dialog Box.
3. The AutoLink Specification form appears. Choose the type of autolink from along the top of the form.

4. The *Choices* list box displays the entries for the selected item. You may click the SHOW ALL button to display all possible entries **or** type a few characters in the SEARCH box and click the FIND button for a limited selection. When first opened, the boxes default to A.

(This functionality has been disabled.)

5. Move your selections from the *Choices* list box to the *AutoLinks* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons



Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.



Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.



Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.



Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

6. Click the SAVE button to create the AutoLinks. (You may save after establishing the AutoLinks for each individual item or wait until links are established for all items.)

7. Repeat Steps 3 through 6 for each autolink type.

NOTE: To obtain link detail information on an entry, click on the entry from one of the list boxes. Right mouse click and choose “Details”.

Reports

Query Template Utility

The Query Template Utility is used to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). Templates may then be used to print the report in the future without having to make sort selections and category selections each time.

- Select REPORTS|SELECT REPORT menu bar command. The Query Template Utility form appears.

Query Template Utility (Report: System Default)

Use the Template menu to access template options such as create new, Save and print.

Template:

**PCMM AD HOC QUERY REPORTS ARE VERY CPU INTENSIVE
DO NOT PRINT REPORTS DURING PEAK
HOURS OF COMPUTER USE
usually 7am to 5pm check with your IRM**

Read Only

Name:

Description:

Access Level
☐ Private ☒ Public

Creator: POSTMASTER
Last Saved: 10/05/2004

Criteria

Report:

Sort:

Printer:

Query Template Utility


- Click the desired category button at top of form **or** choose the TEMPLATE|OPEN menu bar command to display the desired template type(s) in the drop down list.

Per (Personal) - your templates only

Pub (Public) - public templates only

All - both your personal and all public templates

Create a New Template

1. Click the Create a New Template toolbar speed button  on the Query Template Utility form or choose the TEMPLATE|NEW menu bar command.

2. Edit the Name text box and enter a description.

3. Assign either Private or Public access level to the template by clicking the correct radio button.

4. Enter the report criteria.

- Select the Report from the drop down list.
- If the Sort field is disabled, the default sort values will be used. If the Sort field is enabled, select the desired sort from the drop down list.
- Select the printer from the drop down list.
- In addition to the Sort and Printer fields, some reports have other unique data fields. These fields will appear below the Selections button on the form. (See Report Descriptions for a description of each available PCMM report and any unique fields.)

5. Click the Selections Button and enter the report specifications (divisions, teams, etc.). (*See Create a New Template - Report Specifications*). To obtain selection detail information on an entry, click on the entry from either of the list boxes. Right mouse click and choose “Details”.

6. If you wish to save this template after you have made and validated your selections, click the Save Template Changes toolbar speed button, or choose the TEMPLATE|SAVE menu bar command.

Query Template Utility

Create a New Template - Report Specifications

Selection Specification (Query: New Query for)

☒ Division
 ☐ Team
 ☐ Practitioner
 ☐ Role
 ☐ Clinic
 ☐ User Class

Possible Choices

- CHEYENNE VAMC
- FORT COLLINS
- GREELEY CBOC
- SIDNEY CBOC

☒ Show All

Include Selected >
 Include All >>
 Exclude All <<
 Exclude Selected <

Selections

Validate Changes
 Undo Changes

Legend

- None Selected
- Some Selected
- Selections Changed
- Bold** = Only 1 Selection Allowed
- Italic* = Not Required

Close
 Help

1. Choose the category along the top of the form for which you wish to select report specifications.

2. The *Possible Choices* list box displays the entries for the selected item. When first opened, the SHOW ALL field is checked which displays all possible entries. For a limited selection of entries, click the SHOW ALL check box to display the SEARCH box. Type a few characters in the SEARCH box and click the FIND button.

NOTE: If you have selected the Practitioner Demographics report, this form will appear differently. Since only one practitioner may be selected, the double arrow buttons are not visible. The SEARCH box appears instead of the SHOW ALL check box.

Query Template Utility

3. Move your selections from the *Possible Choices* list box to the *Selections* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Include Selected >

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Include All >>

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

< Exclude Selected

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

<< Exclude All

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

4. Repeat Steps 1 to 3 for each category.

5. Click the Validate button. The validation action checks the relationships between the category selections (teams associated with correct division, clinics associated with correct division, etc.). If validation cannot be made, you will receive an Error Report explaining the inconsistency. Close the form.

Modify an Existing Template

1. Select REPORTS|SELECT REPORT menu bar command

2. Select the template name from the drop down list.

3. Edit the report criteria.

4. Click the Selections button and edit the report specifications (divisions, teams, etc.). Be sure to validate your selections when complete. Close the form.

5. If you wish to save this template, click the Save Template Changes toolbar speed button or choose the TEMPLATE|SAVE menu bar command.

Query Template Utility

Printing Reports

Reports cannot be printed to the screen using the graphical user interface. They must be sent to a printer. These same reports may be printed to both the screen and to a printer through the Scheduling software.

To print a report from a template

1. Select the REPORTS|SELECT REPORTS menu bar command to open the Query Template Utility form.
2. Select the template name from the drop down list.
3. Click the Print Report toolbar speed button **or** choose the TEMPLATE|PRINT menu bar command.
4. If the Report Print dialog box appears, select the printer from the drop down list and click OK.

To print a report not set up in a template

1. Select the REPORTS|SELECT REPORTS menu bar command to open the Query Template Utility form.
2. Click the Create a New Template toolbar speed button.
3. Select the report name and report criteria (sort, printer, etc.).
4. Click the Selections button and choose the report specifications. Be sure to validate your selections when complete. Close the form.
5. Click the Print Report toolbar speed button **or** choose the TEMPLATE|PRINT menu bar command.
6. If the Report Print dialog box appears, select the printer from the drop down list and click OK.

Query Template Utility

Template Menu Bar Commands

Restore

Will restore the selected template values to what they were at the time of the last save.

Save As

Use the Save As function to save an existing query under a different name.

- Select the template name from the drop down list.
- Select the *Save As* menu bar command and rename the template. Change the description if desired.
- Follow Steps 3 through 5 under Modify an Existing Template.

Set Default

To set a template as your default value, select the template name from the drop down list and click the Set your Default Template to Current toolbar speed button **or** choose the *Set Default* menu bar command.

Delete

To delete an existing template, select the template name from the drop down list. Select the *Delete* menu bar command. Click OK.

Automated Patient Inactivation from Primary Care Panels Report - GUI

This report is used to build a report listing patients that were unassigned during a specific date range.

- Select REPORTS|PATIENTS AUTO INACTIVATION menu bar command. The Patients Auto Inactivation Criteria Selection form appears.

When selecting options keep in mind that the more categories you select, the longer the report will take. If no items in a category are selected, all are used. Please use care when making your selections to get the exact data you need.

Patients Auto Inactivation Criteria Selection

Institutions Teams Team Positions Assigned Providers

Select Institutions Select Teams Select Positions Select Providers

If no items in a category are selected, All are used.

Beginning Date
2/ 1/2010

Ending Date
3/ 3/2010

Sort Order (Optional)

Select Sort Order

Preview Print Close

Creating an Automated Patient Inactivation from Primary Care Panels Report

- 1.** Click the Select Institutions button to select one or more institutions to include on the report. The Choices dialog will appear. Click on desired Institution(s) then click Include Selected to include the selected institution(s) or Include All to include all institutions.
- 2.** Click the Select Teams button to select one or more teams to include on the report. The Choices dialog will appear. Click on desired team(s) then click Include Selected to include the selected team(s) or Include All to include all teams.
- 3.** Click the Select Positions button to select one or more positions to include on the report. The Choices dialog will appear. Click on desired position(s) then click Include Selected to include the selected position(s) or Include All to include all positions.
- 4.** Click the Select Providers button to select one or more providers to include on the report. The Choices dialog will appear. Click on desired provider(s) then click Include Selected to include the selected provider(s) or Include All to include all providers.
- 5.** Click the Sort Order button to select which fields the report will be sorted by. The Choices dialog will appear. Click on desired field(s) then click Include Selected to include the selected field (s) or Include All to include all fields.
- 6.** Click Beginning Date drop down list arrow to right of date to drop down a calendar and select a beginning date for the report. You may also type in the date by double-clicking to highlight the day/month/year then type your changes.
- 7.** Click Ending Date drop down list arrow to right of date to drop down a calendar and select an ending date for the report. You may also type in the date by double-clicking to highlight the day/month/year then type your changes.
- 8.** Click Preview to view the report before printing or Print to print the report to any Windows printer.

Report Descriptions - GUI

Below is a description of each available PCMM GUI report and any unique fields (shown in italics).

Detailed Patient Assignments – obsolete

Information can be found in the *Team Patient Listing* Report or *Practitioners Patients* Report

Individual Team Profile

Displays basic team definition information

Patient Listing for Team Assignments

Lists patients along with selected team information

Practitioner Demographics

Displays administrative information for a chosen practitioner - can only select one practitioner per report

Practitioner's Patients

Identifies the size and constituents of a practitioner's patient panel

Summary Only - Check to only print totals on the report

Summary Listing of Teams

Reports the number of patients assigned for each practitioner currently assigned to the team

Team Member Listing

Shows basic information on the team and member practitioners - may be used to review which practitioners were assigned to a team during a certain time period.

Date Range - Print the report for this date range. Double clicking on the date edit boxes generates a calendar to select from.

Team Patient Listing

Lists a team's patients and the clinics in which they are enrolled

Reports – Roll and Scroll

Many PCMM Reports are available only as roll and scroll Menu options.

From the Outputs menu (under the Scheduling Manager's menu), type **PCMM** to access the PCMM Main Menu. The PCMM Main Menu contains the following reports and options.

```
PT      PATIENT REPORTS AND OPTIONS ...
PR      PROVIDER/POSITION REPORTS AND OPTIONS ...
TM      TEAM REPORTS AND OPTIONS ...
HAR     HISTORICAL ASSIGNMENT REPORTS ...
HL      PCMM HL7 AND MAINTENANCE MENU ...
        **> Out of order: This functionality is now accomplished by CDW/VSSC.
WL      Wait List (Sch/PCMM) Menu ...
```

Note: See Appendix for examples of many PCMM Reports.

Reports – Roll and Scroll

Patient Reports and Options

The Patient Reports and Options Menu accesses patient-related reports that are not available through the PCMM GUI.

Available Patient Reports are as follows.

AU	Team/Position Assignment/Re-Assignment
DPA	Detailed Patient Assignments
	**> Out of Order: Obsolete with SD*5.3*535
PAD	Historical Patient Assignment Detail
PATA	Patient Listing for Team Assignments
REV	Patient Team Position Assignment Review
PTAL	Historical Patient Position Assignment Listing
SCHD	Patients Scheduled for Inactivation from PC Panels
EXTD	Patients with Extended Primary Care Inactivation
INAC	Patients Automated Inactivations from PC Panels
EXTP	Extend Patient Inactivation Date

Reports – Roll and Scroll

Patient Reports and Options

Team/Position Assignment/Re-Assignment Option

This VistA option determines a patient's Primary Care status. This option is also available from the PCMM GUI (see note below). Based on status, it will prompt the user to select from the following choices.

- Assign patient to Primary Care (PC) or non-primary care team (if not currently assigned).
- Assign patient to PC or non-primary care Practitioner position (if assigned to a team, but not PC practitioner). User can perform a look-up by either position name or the current practitioner assigned to the position.
- Un-assign from team (if assigned to a PC or non-PC team). If patient is assigned to PC position, both the PC position and PC team will be unassigned.
- Un-assign from position.
- While assigning/un-assigning from a position: If the position has an Associated Clinic, the user will be prompted to enroll/discharge the patient from that Associated Clinic.

Note: This option must be used in the PCMM GUI if you need to:

- Edit or delete
- Re-assign patients with future PC assignments
- If the team position does not have a practitioner currently assigned to it

Reports – Roll and Scroll

Patient Reports and Options

Detailed Patient Assignments OUT OF ORDER - OBSOLETE

This report provides information regarding patient team and clinic assignments. This report requires 132-column output.

Report Columns

- Patient Name
- Patient ID
- Means Test Status
- Primary Eligibility
- Last Appointment
- Next Appointment
- Enrolled Clinic
- Primary Care Provider
- Associate Provider

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- (A)ssigned or (U)nassigned Patients to Primary Care Team - May select patients currently assigned or previously assigned to the chosen teams

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Assignment Detail

This 80-column report lists the providers and their positions and the teams to which the selected patient was assigned for the selected time frame.

Report Columns

- Patient
- SSN
- DOB
- Age
- Gender
- Assignment
 - PC Provider
 - PC Associate Provider
 - PC Position
 - User Entering
 - Last Edited By
 - Status
 - PC Preceptor Position
 - PC Team
 - Non-PC Provider
 - Non-PC Position
 - Non-PC Preceptor Provider
 - Non-PC Preceptor Position
 - Non-PC Team
- Active
- Inactive
- Assigned by/date

If user says YES to - Do you wish to view active patient record flag details?

Report Columns

- Patient Record Flags
- Date
- Page x of n
- Patient/SSN
- DOB
- ICN
- CMOR

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Assignment Detail, cont.

Report Options

- Select Patient Name
- If Active Patient Record Flag(s) are present this option appears:
Do you wish to view active patient record flag details? Yes//
If yes, then Patient Record Flags are listed.
- Select beginning date
- Select ending date
- Device

Reports – Roll and Scroll

Patient Reports and Options

Patient Listing for Team Assignments

This report provides information regarding patients' team assignment, sorted by Team and Practitioner. This report requires 132-column output.

Report Columns

- Patient Name
- Patient ID
- Date Assigned
- Primary Care Type (PC?)
 - AP = Associate provider
 - PCP = Primary Care Provider
 - NPC = Non-Primary Care Provider
- Practitioner
- Position
- Standard Role
- Preceptor

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one or all roles
- Select Practitioner – May select one or more practitioners

Reports – Roll and Scroll

Patient Reports and Options

Patient Team Position Assignment Review

This report reviews Patient Team Position Assignments and identifies active positions with discharged team assignments. The report then generates a MailMan message that delivers the information to the requestor.

Report Columns

- Patient Team Position Assignments Reviewed
- Number of Assignments with Problems
- Team
- Position
- Patient
- Error

Report Options

- Select Team – May select one/many/all teams

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Position Assignment Listing

This report requires 132-column output.

Report Columns

Detailed Report contains

- Patient Name
- Patient ID
- Primary Eligibility
- Means Test Category
- Team
- Provider
- Team Position
- Primary Care Type (PC?)
 - AP = Associate provider
 - PCP = Primary Care Provider
 - NPC = Non-Primary Care Provider
- Enrolled Clinic
- Activation Date
- Inactivation Date

Report Columns

Summary Report contains

- Category
- Count
- Percent
- Total assignments that meet the parameters of this report
- Total unique patients that meet the parameters of this report

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Position Assignment Listing, cont.

Report Options

- Select beginning date
 - Select ending date
 - Select one of the following
 - P Primary Care Assignments
 - N Non- Primary Care Assignments
 - B Both PC and Non-PC
- Specify the type of assignments to include:
- Select one of the following:
 - D Detail + Summary
 - S Summary Only
- Specify output format (Choose output format from the list above)
- Select Institution - May select one/many/all institutions
 - Select Team - May select one/many/all teams
 - Select Team Position - May select one/many/all positions
 - Select PC Provider - May select one/many/all PC providers
 - Select Assigned Provider - May select one/many/all assigned providers
 - Select Associated Clinic - May select one/many/all positions
 - Select one of the following **** Output sort order (optional) ****
 - IN Institution
 - TM Team
 - TP Team Position
 - PR Provider
 - EC Enrolled Clinic
 - PT Patient
- Sort output by (Choose sort order from above list)

Reports – Roll and Scroll

Patient Reports and Options

Patients Scheduled for Inactivation from PC Panels

Header

Patients Scheduled for Inactivation from PC Panels (Title)

Date

Report Columns

- Patient Name
- SSN
- Institution
- PC Team
- Provider
- Team Position
- Date scheduled to Inactivate
- Next Appointment
- Date/Clinic

Report Options

- Select beginning date
- Select ending date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select PC Provider - May select one/many/all PC providers
- Select one of the following **** Output sort order (optional) ****
 - IN Institution
 - TM Team
 - TP Team Position

Patients Scheduled for Inactivation from PC Panels

PR Provider
PT Patient

Sort output by (Displays the sort order selected)

Reports – Roll and Scroll

Patient Reports and Options

Patients with Extended Primary Care Inactivation

Report Columns

- Patient
- SSN
- Institution
- PC Team
- Provider/Position
- Preceptor/Position
- Date Scheduled for Inactivation/Reason

Report Options

- Select beginning date
- Select ending date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select Assigned Provider - May select one/many/all assigned providers
- Select one of the following **** Output sort order (optional) ****

IN	Institution
TM	Team
TP	Team Position

PCMM Patients with Extended Inactivations

PR	Provider
P	Patient

Sort output by: (Displays the sort order selected)

Reports – Roll and Scroll

Patient Reports and Options

Patients Automated Inactivations from PC Panels

Report Columns

- Patient
- SSN
- Institution
- PC Team
- Provider/Team Position
- Preceptor/Team Position
- Date Patient Inactivated
- Reason Patient Inactivated

Report Options

- Select beginning date
- Select ending date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select Assigned Provider - May select one/many/all assigned providers
- Select one of the following: **** Output sort order (optional) ****
 - IN Institution
 - TM Team
 - TP Team Position

PCMM Patients with Extended Inactivations

PR Provider
PT Patient

Reports – Roll and Scroll

Patient Reports and Options

Extend Patient Inactivation Date

This option lists the patients, by name only, that are scheduled for automatic inactivation for the selected team. It allows for extending the date of the automatic inactivation and selecting a reason for the extension.

Report Columns

- None

Report Options

- Select Team Name
- Select From - Select from the list of patients on the team that are schedule for inactivation
- Extend Automatic Inactivation (Possible choices)

0 - Do Not Extend (Default)

1 - Patient has Future PC Appointment

2 - Provider Request – Will Contact Patient

3 - Patient Contacted Site for Appointment

4 - Other [Place comment here]

Reports – Roll and Scroll

Provider/Position Reports and Options

PCMM Roll and scroll – Provider/Position Reports and Options Menu

EP	PCMM Edit Practitioner in Position Assig. File
PD	Practitioner Demographics
PP	Practitioner's Patients
PRAL	Historical Provider Position Assignment Listing
INCR	PCMM Inconsistency Report
FTEE	FTEE and Panel Size Report
SSI	Staff Sched for Inactivation
SI	Staff Inactivated Report

Reports – Roll and Scroll

Provider/Position Reports and Options

PCMM Edit Practitioner in Position Assig. File

This report identifies invalid practitioner entries and allows for edits. It is locked with the SC PCMM SETUP security key.

Reports – Roll and Scroll

Provider/Position Reports and Options

Practitioner Demographics

This report provides information about the practitioners.

Report Columns

- Name
- Date
- Service/Section
- Team
- Position
- Role
- User Class
- Room
- Phone
- Associated Clinic
- Person Class
- Patients Allowed
- Patients Assigned

Report Options

- Select individual Practitioner - Answer with NEW PERSON NUMBER, or NAME, or INITIAL, or SSN, or VERIFY CODE, or NICK NAME, or MAIL CODE, or DEA#, or VA#, or ALIAS
- Note: Imprecise selections will yield an additional prompt.

Reports – Roll and Scroll

Provider/Position Reports and Options

Practitioner's Patients

Report Columns (Summary Report)

- Date
- Patients
- Practitioner Position
- Team
- Patients Assigned (Number of Patients Assigned)

Report Columns (Detailed Report)

- Date
- Team
- Division
- Practitioner
- Patient Name
- Patient ID
- Means Test Status
- Primary Eligibility
- Last Appointment
- Next Appointment
- Clinic

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one/many/all roles
- Select Practitioner - May select one/many/all practitioners
- Print Summary Only? N// y YES
- Sort By:
 - [1] Division, Team, Practitioner
 - [2] Division, Practitioner, Team
 - [3] Practitioner, Associated Clinic

Reports – Roll and Scroll

Provider/Position Reports and Options

Historical Provider Position Assignment Listing

This report reflects a count of all unique patients assigned to primary care and non-primary care within the date range selected. If a date range larger than one day has been selected, the total patients assigned to a provider may be greater than the maximum defined for the position. However, this does not imply that the provider had more than their maximum number of patients on any single date.

Report Columns

- Detail for Provider Position Assignments Effective (Date Range)
- Date printed (Date and Time)
- Provider Name
- Position
- Primary Care Status (PC?)
- Team
- Associated Clinic
- Max. Patients Allowed
- Assigned Patients Primary Care (PC)
- Assigned Patients Non-Primary Care (Non-PC)
- Open Slots
- Precepted Patients Primary Care (PC)
- Precepted Patients Non-Primary Care (Non-PC)

Reports – Roll and Scroll

Provider/Position Reports and Options

Historical Provider Position Assignment Listing, cont.

Report Options

- Select beginning date: TODAY// (APR 03, 2006) Date Range Selection
- Select ending date: TODAY// (APR 03, 2006) Date Range Selection
- Select one of the following: Report Parameter Selection
 - P PRIMARY CARE ASSIGNMENTS
 - N NON-PRIMARY CARE ASSIGNMENTS
 - B BOTH PC AND NON-PC
- Specify the type of assignments to include: BOTH// b BOTH PC AND NON-PC
- Select one of the following:
 - D DETAIL + SUMMARY
 - S SUMMARY ONLY

Specify output format: DETAIL + SUMMARY// d DETAIL + SUMMARY

Select Institution - May select one/many/all divisions

Select Team - May select one/many/all teams

Select Assigned Provider - May select one/many/all providers

Select Associated Clinic - May select one/many/all clinics

Select one of the following Output sort order (optional)

- IN INSTITUTION
- TM TEAM
- TP TEAM POSITION
- PR PROVIDER
- EC ENROLLED CLINIC

Sort output by (Lists selected output)

Reports – Roll and Scroll

Provider/Position Reports and Options

PCMM Inconsistency Report

Report Columns

- Position Inconsistencies
- Inconsistency (i.e., Position has no staff assigned)
- Team
- Position
- Patient Inconsistencies
- Patient
- SSN
- Inconsistency (i.e., Position assignment with inactive Team Assignment)
- Team
- Position

Report Options

- Select one of the following:
 - A All Teams
 - S Specific Teams
 - I Inconsistency Descriptions
- Select one of the following: (Report Type)
 - B Brief
 - DP Detailed by PATIENT
 - DT Detailed by TEAM

Reports – Roll and Scroll

Provider/Position Reports and Options

FTEE and Panel Size Report

Report Columns

- Date
- Provider's Name
- Team
- Team Position
- AP or PCP
- Associated Clinic
- FTEE
- Patient's for Position Actual/Active
- Patient's for Position Allowed/Maximum
- Available Patient Openings
- Adjusted Panel Size
- Total

Report Options

- Select Institution - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select Assigned Provider - May select one/many/all providers
- Select one of the following: Output sort order (optional)
 - IN INSTITUTION
 - TM TEAM
 - TP TEAM POSITION
 - PR PROVIDER
 - AC ASSOCIATED CLINIC
- Sort output by (Lists selected output)

Reports – Roll and Scroll

Provider/Position Reports and Options

Staff Sched for Inactivation

Note: Do not print this report between 7 am and 5 pm. Because this report is resource intensive, printing should be done during off peak hours.

Report Columns

- Date
- Name
- Team Position
- Associated Clinics
- Role
- Person Class
- Number of Patients (# of pts)
- Scheduled Inactivation Date
- Inconsistency Reason

Report Options

- Start with Institution
- Go to Institution
- Device

Reports – Roll and Scroll

Provider/Position Reports and Options

Staff Inactivated Report

Report Columns

- Date
- Name
- Team Position
- Associated Clinics
- Role
- Person Class
- Number of Patients (# of pts)
- Date Inactivation
- Inconsistency Reason

Report Options

- Start with Institution
- Go to Institution
- Device

Reports – Roll and Scroll

Team Reports and Options

Example of Team Reports and Options Menu

ITP	Individual Team Profile
TML	Team Member Listing
TPL	Team Patient Listing
SLT	Summary Listing of Teams
TAS	Historical Team Assignment Summary

Reports – Roll and Scroll

Team Reports and Options

Individual Team Profile

This report requires 132-column output. This report provides information team members and their assignments.

Report Columns

- Printed on (Date)
- Division
- Team Name
- Service/Section
- Team Phone
- Team Settings
- Status (Active /Inactive)
- Maximum Patients
- Unique Patients Assigned
- Purpose
- Note: (This team is not accepting patients/This team is still accepting patients!)
- Team Description
- Team Position
- Provider Name
- Standard Role
- Primary Care Status (PC?)
- Patients Allowed
- Patients Assigned
- Associated Clinic

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams

Reports – Roll and Scroll

Team Reports and Options

Team Member Listing

This 80 column report list team members during a specific date range. Using the default date of **Today** will list only current team members.

Report Columns

- Printed on
- Division
- Team Name
- Team Phone
- Primary Care Team (Yes/No)
- Members (Name)
- Position
- Standard Role
- User Class
- Associated Clinic
- Office Phone
- Room
- Begin Date
- End Date
- Person Class

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Begin Date
- End Date
- Select Role - May select one/many/all roles

Reports – Roll and Scroll

Team Reports and Options

Team Patient Listing

Report Columns

- Printed on
- Division
- Team
- Team Phone
- Primary Care Team (Yes/No)
- Team Description
- Patient Name
- Patient ID
- Practitioner
 - [Not Assigned] = Patient assigned to Team but not to a position/provider
 - [Inactive Position] = Patient assigned to Team & Position but has no active provider
- Role
- Primary Care Type (PC?)
- Last Appointment
- Next Appointment
- Associated Clinic

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one/many/all roles
- Sort by

[1] Division, Team, Patient Name

[2] Division, Team, Last 4 Pt ID

[3] Division, Team, Practitioner, Patient Name

[4] Division, Team, Practitioner, Last 4 Pt ID

Select 1, 2, 3, or 4:

Reports – Roll and Scroll

Team Reports and Options

Summary Listing of Teams

Report Columns

- Printed on
- Division
- Team Name
- Practitioner
- Position
- Primary Care Type (PC?)
- Standard Role
- Associated Clinic
- Maximum Patients Allowed
- Assigned Patients - Primary Care
- Assigned Patients - Non Primary Care
- Precepted Patients - Primary Care
- Precepted Patients - Non Primary Care

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one/many/all roles

Reports – Roll and Scroll

Team Reports and Options

Historical Team Assignment Summary

This 132-column report represents a count of team and team position assignments within the date range selected. If a date range larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined for the team, reducing the open slots reflected by this report accordingly. However, this does not imply that the team had more than its maximum number of patients on any single date.

Report Columns

- Effective Date Range
- Printed on
- Division
- Team
- Primary Care Type (PC?)
- Maximum Patients
- Team Assignment
- Team Assignment Unique
- Team Position Assignments Primary Care
- Team Position Assignments Non Primary Care
- Team Position Unique Patients Primary Care
- Team Position Unique Patients Non Primary Care
- Total Unique Patients
- Open Slots
- Patients without Position Assignment
- Patients without Team Assignment

Report Options

- Begin Date
- End Date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams

Reports – Roll and Scroll

Historical Assignment Reports

Example of PCMM Roll and scroll – Historical Assignment Reports Menu

PAD	Historical Patient Assignment Detail
PRAL	Historical Provider Position Assignment Listing
PTAL	Historical Patient Position Assignment Listing
TAS	Historical Team Assignment Summary

Reports – Roll and Scroll

Historical Assignment Reports

Historical Patient Assignment Detail

Report Columns

- Date printed
- Patient
- SSN
- DOB
- Age
- Gender
- Assignment
 - PC Provider
 - PC Associate Provider
 - PC Position
 - User Entering
 - Last Edited By
 - Status
 - PC Preceptor Position
 - PC Team
 - Non-PC Provider
 - Non-PC Position
 - Non-PC Preceptor Provider
 - Non-PC Preceptor Position
 - Non-PC Team
- Active
- Inactive
- Assigned by/date

Report Options

- Select Patient Name
- Select beginning date
- Select ending date
- Device

Reports – Roll and Scroll

Historical Assignment Reports

Historical Provider Position Assignment Listing

Report Columns

- Effective Date Range
- Printed on
- Division
- Team
- Primary Care Type (PC?)
- Maximum Patients
- Team Assignment
- Team Assignment Unique
- Team Position Assignments Primary Care
- Team Position Assignments Non Primary Care
- Team Position Unique Patients Primary Care
- Team Position Unique Patients Non Primary Care
- Total Unique Patients
- Open Slots
- Patients without Position Assignment
- Patients without Team Assignment

Report Options

- Select beginning date
- Select ending date
- Select one of the following (Specify the type of assignments to include)
 - P PRIMARY CARE ASSIGNMENTS
 - N NON-PRIMARY CARE ASSIGNMENTS
 - B BOTH PC AND NON-PC
- Select one of the following (Specify output format)
 - D DETAIL + SUMMARY
 - SUMMARY ONLY
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select one of the following (Sort output by)
 - IN INSTITUTION
 - TM TEAM
 - TP TEAM POSITION
 - PR PROVIDER
 - EC ENROLLED CLINIC

:

Reports – Roll and Scroll

Historical Assignment Reports

Historical Patient Position Assignment Listing

In this 132-column report, more than one provider may be associated with a single patient position assignment. This output returns a separate output line for each related provider during the date range selected.

Report Columns

- Date printed
- Patient Name
- Patient ID
- Primary Eligibility
- Means Test Category
- Team
- Provider
- Team Position
- Primary Care Type (PC?)
AP = Associate provider
PCP = Primary Care Provider
NPC = Non-Primary Care Provider
- Enrolled Clinic
- Activation Date
- Inactivation Date

Report Options

- Select beginning date
- Select ending date
- Select one of the following (Specify the type of assignments to include)
P PRIMARY CARE ASSIGNMENTS
N NON-PRIMARY CARE ASSIGNMENTS
B BOTH PC AND NON-PC
- Select one of the following (Specify output format)
D DETAIL + SUMMARY **or** S SUMMARY ONLY
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select one of the following (Sort output by)
IN INSTITUTION
TM TEAM
TP TEAM POSITION
PR PROVIDER
EC ENROLLED CLINIC
PT PATIENT

Reports – Roll and Scroll

Historical Assignment Reports

Historical Team Assignment Summary

This 132-column report represents a count of team and team position assignments within the date range selected. If a date range larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined for the team, reducing the open slots reflected by this report accordingly. However, this does not imply that the team had more than its maximum number of patients on any single date.

Report Columns

- Effective Date Range
- Printed on
- Division
- Team
- Primary Care Type (PC?)
- Maximum Patients
- Team Assignment
- Team Assignment Unique
- Team Position Assignments Primary Care
- Team Position Assignments Non Primary Care
- Team Position Unique Patients Primary Care
- Team Position Unique Patients Non Primary Care
- Total Unique Patients
- Open Slots
- Patients without Position Assignment
- Patients without Team Assignment

Report Options

- Begin Date
- End Date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

Menu placed out of order.

Reports – Roll and Scroll

Wait List (Sch/PCMM) Menu

Example of Wait List (Sch/PCMM) Menu

- 1 Inquire Wait List (Sch/PCMM)
- 2 Enter/Edit Wait List (Sch/PCMM)
- 3 Disposition Wait List (Sch/PCMM) Entry
- 4 Wait List (Sch/PCMM) Reports ...
- 5 Wait List (Sch/PCMM) Parameter Enter/Edit

Stand-alone Options

This section includes the option documentation for the Mass Team/Position Unassignment option, the Patient Team Position Assignment Review option, the PCMM Nightly Task option, the Clean-Up Ghost Entries option, and the Clean-Up Incorrect Team Institution Pointers option. These options are not distributed as part of any existing menu. They are intended for IRM or select ADPAC personnel.

Mass Team/Position Unassignment

Introduction

The Mass Team/Position Unassignment option can be used to unassign a large number of patients from an active team or an active position using the List Manager functionality. It is recommended that distribution of this option be limited.

The effective date you choose for the unassignment may be in the past, today, or in the future. The list of patients displayed contains all patients with assignments to the selected team/position, as of the selected effective date or after the effective date. Those with assignment dates in the future will show an asterisk (*) next to the assigned date.

When patients are unassigned from the team, they are also automatically unassigned from any associated position. If a position is associated with a clinic, you are given the opportunity to also discharge patients from the clinic.

The following is an explanation of the actions available.

- SA** Select all patients on the list
- DA** Deselect all patients on the list
- SP** Select individual patients
- DP** Deselect individual patients
- VA** List all patients. Those selected will show a YES in the Selected column.
- VS** Only list patient that have been selected
- VD** Only list patients that have not been selected
- UN** Will queue the unassignment process after you say you want to continue

Mass Team/Position Unassignment

After you have selected the patients, choose the Unassign Patients action. A summary of the unassignments that will occur is displayed. You are then asked if you are sure you want to continue. A YES response immediately queues the unassignment process and the Task # is displayed. A NO response returns the screen to where it was before the Unassign Patients action was entered.

A confirmation MailMan message is generated from the utilization of the unassign action. It contains the team name and the effective date of the unassignment. The “Entry#” (shown for errors and for future assignments that are deleted) is the internal entry number of the deleted entry. It comes from the PATIENT TEAM ASSIGNMENT file (#404.42) or the PATIENT TEAM POSITION ASSIGNMENT file (#404.43). The following applicable information is also contained in the mail message.

Patients Processed

Lists number of patients unassigned, number still assigned due to error, total patients, and any associated clinic discharges.

Clinic Discharges

Lists any associated clinic discharges. The position and associated clinic are displayed.

Error List

Lists those patients still assigned and the reason why.

Unassigned List

Lists those patients unassigned and, for team unassignment, unassignments which were automatically made from associated positions.

Mass Team/Position Unassignment

Example

Select Type of Mass Unassignment: Team// <RET>
 Effective Date: T-1// <RET> (AUG 05, 1998)
 Select TEAM NAME: **LIDSTER**

>>> Checking to see if any team positions are associated with clinics...

```
-----
Team           : LIDSTER
Position       : PHYSICIAN-ATTENDING
Associated Clinic: ORTHO
```

>>> Do you want to discharge patients from this clinic? (Yes/No) **Y** YES

...SORRY, THIS MAY TAKE A FEW MOMENTS...

Mass Team Unassignment Aug 06, 1998 08:07:09 Page: 1 of 1
 Team: LIDSTER Total: 6 Selected: 0

Proposed Effective Date: 08/05/1998 View: ALL

Selected	Patient Name	ID	Assigned	Unassigned
1	PCMMpatient, One	000-89-0909	08/12/97	
2	PCMMpatient, Two	000-12-4321	04/30/97	
3	PCMMpatient, Three	666-00-9899	01/16/98	
4	PCMMpatient, Four	666-87-2290	09/22/97	
5	PCMMpatient, Five	000-33-4122	05/04/98	
6	PCMMpatient, Six	000-44-5634	*08/24/98	

* Future Date
 SA Select All DP DeSelect Patients VD View DeSelected
 DA DeSelect All VA View All UN Unassign Patients
 SP Select Patients VS View Selected QU Quit
 Select Action: Quit// **SA** Select All

...EXCUSE ME, JUST A MOMENT PLEASE...

Mass Team/Position Unassignment

Mass Team Unassignment Aug 06, 1998 08:07:09 Page: 1 of 1
Team: LIDSTER Total: 6 Selected: 0

Proposed Effective Date: 08/05/1998 View: ALL

	Selected	Patient Name	ID	Assigned	Unassigned
1	YES	PCMMpatient, One	000-89-0909	08/12/97	
2	YES	PCMMpatient, Two	000-12-4321	04/30/97	
3	YES	PCMMpatient, Three	666-00-9899	01/16/98	
4	YES	PCMMpatient, Four	666-87-2290	09/22/97	
5	YES	PCMMpatient, Five	000-33-4122	05/04/98	
6	YES	PCMMpatient, Six	000-44-5634	*08/24/98	

* Future Date
SA Select All DP DeSelect Patients VD View DeSelected
DA DeSelect All VA View All UN Unassign Patients
SP Select Patients VS View Selected QU Quit
Select Action: Quit// **UN** Unassign Patients

Team Unassignment Definition

Team : LIDSTER
Effective Date : 08/10/1998
of Patients : 6

Clinic Discharges:	Position	Associated Clinic
	PHYSICIAN-ATTENDING	ORTHO

Are you sure you want to continue? No// **YES**

Task#: 5692

Enter RETURN to continue: **<RET>**

Mass Team/Position Unassignment

Example of MailMan Message

Subj: Mass Team Unassignment Information [#68602] 06 Aug 98 08:07 35 Lines
 From: POSTMASTER (Sender: PCMMstaff, One) in 'IN' basket. Page 1 **NEW**

 Mass Team Unassignment has been completed.

Team: LIDSTER
 User: POSTMASTER
 Effective Date: 08/06/1998

Patients Processed
 Unassigned : 6
 Errors/Warnings: 0 (still assigned)
 Total : 6

Clinic Discharges:	Position	Associated Clinic
-----	-----	-----
	PHYSICIAN-ATTENDING	ORTHO

Error List:
 =====
 No errors to report

Unassigned List:
 =====

Patient	ID
-----	--
PCMMpatient, One	000-89-0909
PCMMpatient, Two	000-12-4321
>>> Position assignment to PCMMprovider, One was unassigned.	
>>> Position assignment to PCMMRNprovider, One was unassigned	
PCMMpatient, Three	666-00-9899
>>> Position assignment to PHYSICIAN-ATTENDING was unassigned.	
>>> Discharged from 'ORTHO' clinic	
PCMMpatient, Four	666-87-2290
>>> Position assignment to PCMMprovider, One was unassigned.	
>>> Position assignment to PCMMRNprovider, One was unassigned	
PCMMpatient, Five	000-33-4122
>>> Position assignment to PCMMprovider, One was unassigned.	
PCMMpatient, Six	000-44-5634
>>> Future team assignment deleted.	
Assignment Date: 08/24/98 Entry#: 3874	
>>> Position assignment to PCMMprovider, One:	
>>> Future position assignment deleted.	
Assignment Date: 08/24/98 Entry#: 2447	

Select MESSAGE Action: IGNORE (in IN basket)//

Patient Team Position Assignment Review

Introduction

The Patient Team Position Assignment Review option makes a comparison of the entries in the PATIENT TEAM POSITION ASSIGNMENT file (#404.43) and the PATIENT TEAM ASSIGNMENT file (#404.42). It checks that the position assignment active timeframe is within the team assignment active timeframe. The current PCMM software is designed to prevent timeframe discrepancies. However, older versions of PCMM did allow these timeframe problems to occur. This report has been designed to help sites identify these problem assignments.

The report is in the form of a mail message and lists those position assignments that fall outside the team assignment active timeframe. Each entry in the mail message will display team name, position, patient name, error, position assigned/unassigned date, and team assigned/unassigned date.

You may correct timeframe discrepancies using the PCMM GUI as follows.

- From the Patient drop down menu, make sure *Show All Team Assignments* is checked.
- From the Patient drop down menu, select *Patient Assignments*.
- Enter the patient name.
- The Select Patient-Team Assignment dialog box appears. Double click on the problem Team Assignment.
- The Team-Position Assignments dialog box appears. Make note of the discharged date on the Team Assignment tab. Click on the Position Assignments tab. Double click on the problem Position Assignment.
- Enter the discharged date from above as the Unassigned Date.

Example

```
Select Team: ALL// BLUE
Select another Team: RED
Select another Team: <RET>
```

```
>>> Task#: 388578
```

```
    This task will send a MailMan message to you containing
    the results of the position assignment review.
```

```
>>> Press RETURN to continue: <RET>
```


Patient Team Position Assignment Review

Subj: Patient Team Position Assignment Review [#70086] 04 Sep 98 10:41 32 Lines
 From: POSTMASTER (Sender: PCMMstaff, Two) in 'IN' basket. Page 1 **NEW**

 In order to correct the following active positions with discharged team assignments, please refer to the documentation for the Patient Team Position Assignment Review option found in the Stand-alone Options Section of the PCMM User Guide.

Teams Reviewed:

BLUE
 RED

Patient Team Position Assignments Reviewed: 12
 Number of Assignments with Problems : 3 (25.00%)

=====

Team: BLUE	Position: PRIMARY CARE PHYSICIAN
Patient: PCMMpatient, Seven (1010)	
Error: Position Assigned Date is BEFORE Team Assigned Date	
Position Assigned Date: 04/25/1996	
Team Assigned Date: 04/28/1996	

Team: BLUE	Position: PRIMARY CARE PHYSICIAN
Patient: PCMMpatient, Eight (0144)	
Error: Position Assigned Date is BEFORE Team Assigned Date	
Position Assigned Date: 08/28/1998	
Team Assigned Date: 08/30/1998	

Team: RED	Position: PHYSICIAN
Patient: PCMMpatient, Nine (7964)	
Error: Position Unassigned Date is AFTER Team Unassigned Date	
Team Unassigned Date: 04/01/1997	
Position Unassigned Date: 07/09/1997	

Select MESSAGE Action: IGNORE (in IN basket)//

PCMM Nightly Task [SCMC PCMM NIGHTLY TASK]

This task should be scheduled once a day. It reviews patient team assignments and inactivates patients who have assignment dates greater than two years old and have not been seen in the last year. This task also identifies staff members who are improperly assigned as Primary Care Providers (PCP). The task also reviews data for other inactivation scenarios. See Inactivation Messages section for examples of the types of bulletins that are sent.

Retransmit one Patient or Provider

To retransmit a single patient enter the patient name at the prompt:
Select PATIENT NAME

To retransmit all patients for a given provider, press return to select the provider.
Select Provider

Either the Patient name or the Provider name must be entered.

Clean-Up Ghost Entries

Introduction

This utility has been created to clean up dangling pointers in the PATIENT TEAM POSITION ASSIGNMENT file (#404.43). This utility loops through the PATIENT TEAM POSITION ASSIGNMENT (#404.43) file and finds the pointers to the PATIENT TEAM ASSIGNMENT (#404.42) file. It will then prompt the user as to whether or not they want the utility to clean up the identified "Ghost Entries."

Example

```
SCMC CLEAN GHOST ENTRIES      Clean-Up Ghost Entries
```

```
Clean-Up Ghost Entries
```

```
Checking for "Ghost Entries" in the PATIENT TEAM POSITION ASSIGNMENT FILE.
This may take a moment.  You will be provided with a list showing
corrupted
file entries.  To perform a clean-up accept the "Yes" prompt after the
list
is displayed. Answer "No" to abort the clean-up.
```

```
DEVICE:   UCX/TELNET      Right Margin: 80//
PATIENT TEAM POSITION ASSIGNMENT LIST      AUG 10,2007  11:08      PAGE
1
```

```
-----
-----
```

```
*** NO RECORDS TO PRINT ***
3159 entries searched.  Ghost entries found:  0
Nothing to clean up....
```

Clean-Up Incorrect Team Institution Pointers

Introduction

This utility has been created to check each team's institution in order to make sure it contains at least the station's base numeric identifier. The utility will then provide a list of teams whose station number association does not match the numeric identifier listed.

Example

SCMC CLEAN INSTITUTION Clean-Up Incorrect Team Institution Pointers

Clean-Up Incorrect Team Institution Pointers

Your Station Name: CHEYENNE VAMC

Number: 442

This option will output a list of TEAMS whose Station Number association does not match the number listed above.

DEVICE: TELNET TERMINAL

```

TEAM LIST                                AUG 10,2007  11:01    PAGE
1
NAME                                INSTITUTION                                STATION #
-----
GREEN TEAM                          ALBANY, NY (NHCU)                          5009AA
JOHN 498 TEST                       PROVIDENCE VAMC                            650

```

The listed entries from the TEAM file need to be reviewed for Institution. PCMM GUI clients prior to SD*5.3*297 allowed Team association to any entry in the Institution File.

If all teams have the correct institution, the following output will be generated:

```

TEAM LIST                                AUG 10,2007  11:07    PAGE
1
NAME                                INSTITUTION                                STATION #
-----
*** NO RECORDS TO PRINT ***

```

No problems found.

Windows Conventions

Standard Windows Objects

These are the types of data entry fields located in standard windows forms:

Check Box

Toggles between a YES/NO, ON/OFF setting. Usually a square box containing a check mark or x. Clicking the box or pressing the spacebar toggles the check box setting.

Command Button

The Command button initiates an action. It is a rectangular box with a label that specifies what the button does. Command buttons that end with three dots indicate that a subsidiary screen may be evoked by selecting the command.

Date Field

Identified by “__/__/__” or a date “mm/dd/yy”. Will usually have an associated popup calendar. Double clicking with the mouse inside the date edit box or tabbing to the edit box and then pressing the F2 key displays the calendar. Clicking on the desired date or using the arrow keys to move to a date and then pressing the spacebar selects the date. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96). The selected entry will not be effective until you tab off or exit from the date field.

Drop Down List

A list box containing an arrow button on the right side which displays one entry at a time. Choose from a vertical list of choices. Select the entry you want by clicking the list entry. You cannot type in this box, only select an item from the list. Once an entry is selected, it cannot be deleted - only changed. If <None> is the last entry, selecting it will clear the list entry. If <More> is the last entry, selecting it will display additional entries. The selected entry will not be effective until you tab off or exit from the drop down list.

F2 Key

Where there is an additional action which may be taken on a field, pressing the F2 key will initiate that action.

Faded Background

Fields that appear with a faded background are currently disabled.

List Box

Box which shows a list of items. If more items exist than can be seen in the box, a scroll bar appears on the side of the box. Selecting an entry from a list box requires either double clicking the entry or single clicking the entry and pressing the spacebar.

Standard Windows Objects

Lookup Box

Choose from a vertical list of choices. By typing in a few characters and pressing the ENTER or TAB key, a list of matching entries drops down. Select the entry you want by clicking the list entry. Entering a question mark and then pressing ENTER or TAB or clicking the down arrow on an empty edit field gives a complete listing of available entries. If <More> is the last entry, selecting it will display additional entries.

Memo Field

This field is equivalent to a word-processing field.

Non-White Background

Items in fields that appear with a non-white background can be selected but cannot be modified directly in that field.

Radio Button

Radio buttons appear in sets. Each button represents a single choice and normally only one button may be selected at any one time. For example, MALE or FEMALE may be offered as choices through two radio buttons. Click in the button to select it.

Right Mouse Button or Shift F10

You may click the right mouse button or press Shift F10 for a popup box of menu items.

Tab Key

Use the TAB key or the mouse to move between fields. Do not use the RETURN key. The RETURN key is usually reserved for the default command button or action (except in menu fields).

Text Box

Type the desired characters into the edit box. The selected entry will not be effective until you tab off or exit from the text box.

Form Buttons

Buttons which appear on tab pages apply only to that tab and not the entire form. If there are action buttons on both the tab page and the form, the tab button should normally be clicked first.

Add

Anytime you reach a screen and the ADD button is enabled, you must first click the ADD button before entering any information.

Assign

Used to assign a staff member, patient, or preceptor to a position.

Autolinks - (*This functionality has been disabled.*)

Opens the Autolinks form used to establish linkages between a team and wards/beds/clinics/practitioners, etc. (for OE/RR).

Cancel

Cancels the latest entry (up until the OK or SAVE button is clicked).

Close

Closes the window. If there are any changes that have not been saved, you will get a confirmation message asking you if you want to continue without saving; save before exiting; or cancel the close action and return to the window.

Edit

Used to edit position information.

Find

Used to quickly find an entry. Enter the search string and click the OK button.

Help

Provides help for the area you are currently working in.

New

Used to open up a dialog box from which you can enter a new team or position.

OK

Adds the new entry after the data has been entered.

Positions

Opens the Primary Care Team Position Setup form. If the team has no active positions, the New Position dialog box will appear.

Preceptor

Opens the Preceptor Assignment Add/Edit form.

Form Buttons**Save**

Saves all changes made since the last save action. If you attempt to save and all required fields have not yet been completed, you will receive notification that the required fields must be completed before saving.

Search

After at least three characters are typed in a lookup dialog box, clicking the Search button will bring up matching entries.

Staff

Opens the Staff Assignment Add/Edit form.

Undo

Undoes all changes made since the last save action and redisplay the original data.

Troubleshooting Guide

Inconsistency Descriptions with Detailed Correction Instructions

1. Position with patient assignment has no staff assigned

Problem: Position exists with patients assigned to the Position, but no staff member is assigned to that Position.

Fix: Use PCMM GUI

- Steps:**
- Click Team pull down menu
 - Select Positions
 - Double Click on correct Team name
 - Team Position Setup window opens
 - Click on correct Active Team position
 - Click on Staff button
 - Click Assign button
 - Enter name of staff member to assign to that position
 - Change Effective Date if appropriate
 - Click Save button

2. Patient on a Team designated PC has no PCP assigned

Problem: Patient is assigned to a Primary Care Team but has no Primary Care Practitioner assigned.

Fix: Use PCMM GUI

- Steps:**
- Click Patient pull down menu
 - Click Patient pull down menu
 - Select Patient Assignment
 - Patient Lookup window opens
 - Enter patient's name
 - Patient – Team Assignment window opens
 - Double-click team name
 - Team – Position Assignments window opens
 - Click on Position Assignments tab
 - Click Assign button
 - Double-click correct Position
 - Position Information window opens
 - Change Assigned Date if appropriate
 - Click OK button
 - Click Save button
 - Close windows

Inconsistency Descriptions with Detailed Correction Instructions

Fix: Use VistA options

- Steps:**
- Select Appointment Management option
 - Enter Patient name
 - Select PC – PC Assign or Unassign action
 - The following is displayed:

1. POSITION ASSIGNMENT - BY PRACTITIONER NAME
2. POSITION ASSIGNMENT - BY POSITION NAME
3. TEAM UNASSIGNMENT

Use either #1 or #2 to assign patient.

- If you select #1: POSITION ASSIGNMENT - BY PRACTITIONER NAME
 - Position's Current PRACTITIONER: (Enter Practitioner's name)

Hint: Type ?? to see list of Practitioners for that Team.

- Assignment Date: TODAY// (Press Return key)
- Are you sure? (Yes/No)? (Enter YES)
- Position Assignment made
- If you select #2 POSITION ASSIGNMENT - BY POSITION NAME
 - POSITION's Name: (Enter the name of the Position)

Hint: Type?? to see list of Positions & staff assigned to that Position for that Team.

- Assignment Date: TODAY// (Press Return key)
- Are you sure? (Yes/No)? (Enter YES)
- Position Assignment made

Inconsistency Descriptions with Detailed Correction Instructions

3. Patient has multiple active PCP assigned

Problem: Patient has multiple active Primary Care Practitioner assigned.

Fix: Use PCMM GUI

- Steps:**
- Determine which PCP assignment is correct
 - Click Patient pull down menu
 - Select Patient Assignment
 - Patient Lookup window opens
 - Enter patient's name
 - Patient – Team Assignment window opens
 - Double-click team name
 - Team – Position Assignments window opens
 - Click on Position Assignments tab
 - Highlight the incorrect Position Assignment
 - Click on Edit pull-down menu
 - Select Position assignment
 - Click on Delete
 - Confirm window opens
 - Click on Yes button
 - Close windows

4. Patient's AP and PCP are the same

Problem: Associate Provider and Primary Care Provider is the same staff member.

Fix: Use PCMM GUI

- Steps:**
- Patient Drop down menu
 - Make sure "Show All Team Assignments" is checked
 - Do Not check under Team drop down menu
 - "Active Only" as you will want all teams to show (active or inactive)
 - Under Team, Click on speed positions setup button
 - Select Team
 - Primary Care Position Setup screen is displayed
 - Click on one of the positions (AP or PCP)
 - Click on the Staff button
 - Click the Inactivate button
 - Assign an effective date, status and reason

Hint: If the date of today is selected, it will not show off the Inconsistency report until Midnight as assignment changes are valid until the end of the day.

- Close

Inconsistency Descriptions with Detailed Correction Instructions

5. AP is without a Preceptor

Problem: Associate Provider is not assigned a Preceptor.

Fix: Use PCMM GUI

- Steps:**
- Click Team pull down menu
 - Select Positions
 - Double Click on correct Team name
 - Team Position Setup window opens
 - Click on correct Active Team position
 - Click on Preceptor button
 - Preceptor Assignment Add/Edit window opens
 - Click Assign button
 - Select Preceptor Position window opens
 - Double click correct Preceptor
 - Change Effective Date if appropriate
 - Click Save
 - Close windows

6. AP position is not designated for PC

Problem: Associate Provider is not listed as Can Provide Primary Care.

Fix: Use PCMM GUI

- Steps:**
- Click Team pull down menu
 - Select Positions
 - Double Click on correct Team name
 - Team Position Setup window opens
 - Click on correct Active Team position
 - Click Settings Tab
 - Click Can Provide Primary Care checkbox
 - Click Save button
 - Close windows

Inconsistency Descriptions with Detailed Correction Instructions

7. PCP position is not designated for PC

Problem: Primary Care Provider position is not listed as Can Provide Primary Care.

Fix: Use PCMM GUI

- Steps:**
- Click Team pull down menu
 - Click Team pull down menu
 - Select Positions
 - Double Click on correct Team name
 - Team Position Setup window opens
 - Click on correct Active Team position
 - Click Settings Tab
 - Click Can Provide Primary Care checkbox
 - Click Save button
 - Close windows

8. Active position assignment with inactive Team Assignment/Team/Position

Problem: An active Position assignment is associated with an inactive Team.

Fix: Use PCMM GUI

- Steps:**
- **Determine if Team should be inactive - If YES**
 - In order to correct this problem, the Team must be made active so that the patients assigned to this Team can be deleted and the Team made inactive again.
 - Click Team pull down menu
 - Click on Active only from pull down menu
 - Click Team pull down menu
 - Select Setup
 - Double Click on correct Team name
 - Click on History Tab
 - Click Add button
 - Change Effective Date if appropriate
 - Click on Reason down arrow
 - Select a reason from the drop down list
 - Click OK button
 - Click Close button
 - The Team is now active
 - (Steps necessary to delete patients assigned to this Team)
 - Click Patient pull down menu
 - Select Patient Assignments
 - Patient Lookup window opens
 - Enter Patient name
 - Double click patient name

Inconsistency Descriptions with Detailed Correction Instructions

- Select Patient – Team Assignment window opens
- Double click Team
- Click Position Assignments tab
- Highlight correct Position Assignment
- Click on Edit pull down menu
- Select Position Assignment from pull down menu
- Click on Delete from pull down menu
- Confirm Window opens
- Click Yes button
- Close window
- Make sure correct Team is highlighted
- Click Assignments pull down menu
- Select Delete from a Team from the pull down menu
- Confirm Window opens
- Click Yes button
- Close window
- (Repeat steps for each patient assigned to this Team)
- (Steps necessary to make Team inactive)
- Click Team pull down menu
- Click on Active only from pull down menu
- Click Team pull down menu
- Select Setup
- Double Click on correct Team name
- Click on History Tab
- Click Add button
- Change Effective Date if appropriate
- Click on Reason down arrow
- Select a reason from the drop down list
- Click OK button
- Click Close button
- The Team is now inactive

Inconsistency Descriptions with Detailed Correction Instructions

- Steps:**
- **Determine if Team should be inactive - If NO**
 - The Team should not be inactive. You need to make this Team active. Follow these steps necessary to make a Team active.
 - Click Team pull down menu
 - Click Team pull down menu
 - Click on Active only from pull down menu
 - Click Team pull down menu
 - Select Setup
 - Double Click on correct Team name
 - Click on History Tab
 - Click Add button
 - Change Effective Date if appropriate
 - Click on Reason down arrow
 - Select a reason from the drop down list
 - Click OK button
 - Click Close button
 - The Team is now active

Inconsistency Descriptions with Detailed Correction Instructions

9. Active position Assignment with Inactive Team Assignment/Team/Position

Problem: An active Position assignment is associated with an inactive Position.

Fix: Use PCMM GUI

- Steps:**
- **Determine if Position should be inactive - If YES**
 - In order to correct this problem, the Position must be made active so that the patients assigned to this Position can be deleted and the Position made inactive again.
 - (The following steps are necessary to make position active.)
 - Click Team pull down menu
 - Select Positions
 - Double Click on correct Team name
 - Team Position Setup window opens
 - Click All Positions radio button to see All Positions (active and inactive)
 - Click on correct Team position
 - Click on History Tab
 - Click Add button
 - Change Effective Date if appropriate
 - Click on Reason down arrow
 - Select a reason from the drop down list
 - Click OK button
 - Click Close button
 - (The following steps necessary to delete patients assigned to this position)
 - Click Patient pull down menu
 - Select Patient Assignments
 - Patient Lookup window opens
 - Enter Patient name
 - Double click patient name
 - Select Patient – Team Assignment window opens
 - Double click Team
 - Click Position Assignments tab
 - Highlight correct Position Assignment
 - Click on Edit pull down menu
 - Select Position Assignment from pull down menu
 - Click on Delete from pull down menu
 - Confirm Window opens
 - Click Yes button
 - Close window
 - (Repeat steps for each patient assigned to this position)

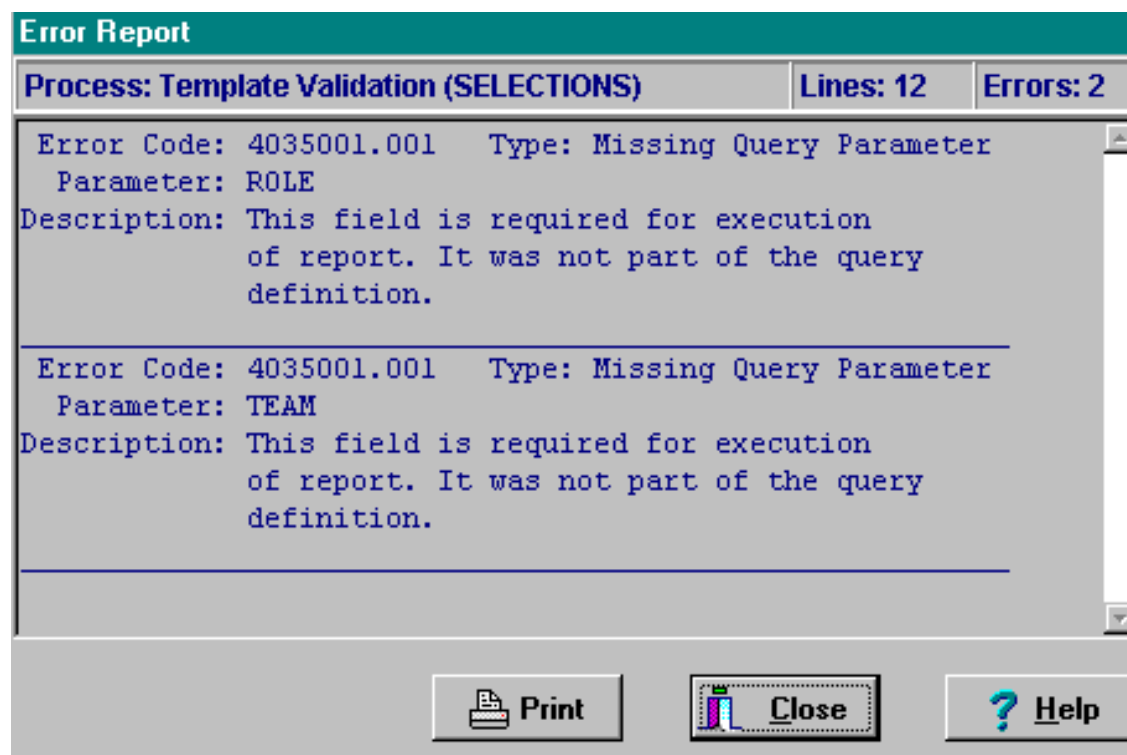
Inconsistency Descriptions with Detailed Correction Instructions

- (The following steps necessary to make position inactive)
- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Team position
- Click on History Tab
- Click Add button
- Change Effective Date if appropriate
- Click on Reason down arrow
- Select a reason from the drop down list
- Click OK button
- Click Close button
- Now the Position is inactive

- Steps:**
- **Determine if Position should be inactive - If NO**
 - You need to make this Position active.
 - (The following steps are necessary to make position active.)
 - Click Team pull down menu
 - Select Positions
 - Double Click on correct Team name
 - Team Position Setup window opens
 - Click on correct Team position
 - Click on History Tab
 - Click Add button
 - Change Effective Date if appropriate
 - Click on Reason down arrow
 - Select a reason from the drop down list
 - Click OK button
 - Click Close button
 - Now the Position is active

Error Report Window

Below is an example of the Error Report Window which may appear if a specified action cannot be processed. A description of the error will appear in the window. You may print the error message. It will print to a windows device and not a VistA device.



Process - Shows what action was being taken at the time of the error.

Lines - Number of lines in the error message.

Errors - Number of errors being reported in the error message.

PCMM Business Rules

The PCMM Business Rules provide information on how some of the PCMM fields will be handled for team, team positions, and patient assignments. These rules are not intended to be all encompassing, but for general information purposes to allow some basic checking within the system to ensure data integrity.

Primary Care Team Business Rules

A Primary Care Provider is a Staff Physician, Physician Assistant, or Nurse Practitioner.

An Associate Provider is a Resident and can be a Physician Assistant and a Nurse Practitioner.

- A patient cannot have more than one primary care provider.
- A primary care provider is authorized to provide primary care and can act as a preceptor. A preceptor is a primary care provider who oversees the activities of an associate provider. The preceptor is the ultimate responsible person for the patient care provided.
- An associate provider is authorized to provide primary care, but cannot act as a preceptor.
- A staff physician is never an associate provider.
- A physician assistant (PA) and nurse practitioner (NP) can be either the primary care provider (PCP) or an associate provider (AP). However, they cannot be both for the same patient.
- An associate provider cannot be the primary care provider.
- An associate provider must have a preceptor link to a primary care provider. An associate provider is not authorized to act on his/her own.
- If a position has a preceptor assigned, that position cannot be a primary care provider or precept over another position. However, this position can and should be marked “can provide primary care”.
- If a position is marked as “can provide primary care”, the preceptor assigned to this position must also have “can provide primary care” marked.
- Primary care patient assignment cannot be made to an associate provider who does not have a preceptor assigned.
- If “can act as preceptor on Primary Care Team” is marked, then “can provide primary care” must also be marked.
- In order to be a preceptor on a primary care team, the provider must be able to provide primary care.
- Establishing a preceptor link will report the associate provider and the primary care provider as active staff members in those positions.
- The inactivation of a patient's PCMM assignment will continue even if a provider change is found.

- When attempting to remove a primary care provider (preceptor) link from an associate provider, the software will check for patient assignments. If there are patient assignments, the user will not be allowed to leave the preceptor link empty (blank). If there are no patient assignments, the preceptor link may be removed. Once a preceptor link is removed, the associate provider doesn't become the primary care provider, as the associate provider is not authorized to be the primary care provider
- Assignments are valid until the end of a day. This allows for the enforcement of the rule that a patient cannot have more than one primary care provider on a given day. (TIP: If you want to inactivate an assignment immediately, assign an inactive date of yesterday.)

Team Setup

- Required information for team setup includes team name, purpose, service, and institution. Additional data fields are optional and further define the team (phone no., description, default team printer, primary care team restrict consults, team closed, auto-assign to team from clinic, auto-discharge from team from clinic, team assignments allowed.)
- The team name can be changed, but it must be a unique entry. Any name entered to replace an existing team name will be checked. If there is already a team with that name, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.
- The deletion of any team is not permitted once a history entry has been established. Once a team is in use, you may inactivate it, but not delete it. If you attempt to delete, you will be given the warning message "The following conditions prevent deletion: History entries are entered".

Team History

- When adding a new entry to the team history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a team that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries of the same status.
- You can only delete the latest date entry in the history list. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The "reason" for any history entry can be changed.
- The status cannot be changed for an existing entry. There are only two status values, active and inactive.
- In order for a team to be inactivated, all positions and staff assignments must be inactivated.

Team Position Setup

- General required information for position setup includes position, role, and message notifications. Additional data fields are optional and further define team purpose (description, beeper, can provide primary care, can act as a preceptor, associated clinic, and number of patients allowed for position).
- See the Primary Care Team Business Rules concerning associate provider and positions that can act as a preceptor on a primary care team.
- The position name can be changed, but it must be a unique entry within the team. You can use the same name for any number of different teams, but not within the same team. Any name entered to replace an existing name will be checked. If there is already a position with that name within the team, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.
- The deletion of any position is not permitted.
- If a position is created in error, you will be able to remove it up until you assign a patient to it, or change its current status. Once a position is in use, you may inactivate it, but not delete it.

Team Position History

- When adding a new entry to the team position history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a position that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries with the same status.
- If you inactivate a position and there is a staff member currently active in the position, a warning message will display stating that the Team Member is Active in Position.
- You can only delete the latest (last) history entry. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The “reason” for any history entry can be changed.

Team Position Staff History

- Only one staff member can be assigned to a position at any given time.
- If there already is an active staff member, you will only be allowed to inactivate the current staff member.
- The status cannot be changed for an existing entry. There are only two status values, active and inactive.
- When assigning a new staff member to a team position, the member's name, effective date, status, and reason for the assignment must be completed before the assignment can be entered.
- When adding a new staff member to a position, the effective date for the new assignment cannot be earlier than the inactivation date of the previous assignment.
- Only the last assignment entry can be deleted.
- The date for an existing assignment can only be changed only if it does not conflict with any of the other assignment entries. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The "reason" for any history entry could be changed.
- The "status reason" for an existing entry may be changed only if it is the latest assignment entry in the Assignment History log and has a status of inactive.

Patient Team Assignment

- The Inconsistency Report displays patients that are assigned to a primary care team without a position assignment. The assignments that are identified will require action.
- Only teams that have the "Primary Care Team" box checked on the Settings Tab of the Team Setup Screen may be assigned as a primary care team. **Note:** This field determines if a team can ever be a primary care team. The team's purpose does not affect the ability of a team to function as a primary care team.
- A patient can only be assigned to one primary care team on any given date.
- A patient can be assigned to more than one non-primary care team.
- In the Multiple Patient Assignments to a Team option, patients currently assigned to the destination team are not listed in the "Available to Assign" list as they are already assigned to that team.
- In the Multiple Patient Assignments to a Team option, if "Make this a Primary Care Team Assignment" is checked, patients who do not have a primary care team will be assigned this team as their primary care team. Patients who have already been assigned to another team as their primary care team will not be assigned to the team.

Patient Team Position Assignment

- In order for a position to be designated as the primary care practitioner position, the following conditions must exist:
 - the team must be able to provide primary care
 - the team must be designated as the patient's primary care team
 - the position must be able to provide primary care
 - the patient can have no other position designated as primary care practitioner.
- See the Primary Care Team Business Rules concerning associate provider and positions that can act a preceptor on a primary care team.
- A patient cannot have more than one primary care provider on any given date.
- Only positions from the patient's primary care team may serve as the primary care provider.
- In multiple patient assignment, the assignment will fail if the patient is already assigned to a primary care team or a primary care position.
- In multiple patient assignment, the assignment will fail if a death entry has been entered for the patient.
- In the Multiple Patient Assignments to a Position option, selected patients who have not yet been assigned to the position's team and are permitted to be assigned to the position (e.g., no conflicts with primary care assignments) will be assigned to the team at the same time.
- Assigning patients by using the Multiple Patient Assignment to a Position option automatically enrolls patients to the team with which the position is assigned.

Processing Team Reassignments

- Team reassignment must be made from a source team to a destination team.
- Team reassignment from a source team to a destination team can be made when the team exists now or in the future.

Processing Position Reassignments

- Position reassignment must be made from a source position to a destination position.

Security Key Changes

The PCMM security key assignments to the VistA PCMM Main Menu, along with its associated menus and options, have been changed as recommended by the PCMM User Workgroup.

Security key changes as of August 2007

The following options no longer require a security key.

SCMC EXTENDED REPORT
SCMC FLAGGED
SCMC INACTIVATED REPORT

SCMC PRACTITIONER FLAGGED
SCMC PC STAFF AUTO INACTIVATE
SCMC PCMM MAIN MENU


To access the following options, the user will need the SC PCMM SETUP security key.

SCMC PCMM NIGHTLY TASK
SCMC RETRANSMIT
SCMC PCMM ERR CODE REPORT
SCMC EXTEND A PATIENT

To access the following options, the user will need the SCMC PCMM RETRANSMIT security key.

SCMC PCMM TRANS ERROR PROC
SCMC PCMM TRANS ERROR REPORT

Glossary

ACOS	Associate Chief of Staff
ADMIN COORDINATOR	The administrative coordinator for Primary Care and Non-Primary Care Teams. This person is involved with administrative (MAS requirements and/or Clinic Administration) duties as well as oversight of the Scheduling process and Primary Care team definition.
ARROW	Arrow is a symbol () that is used to scroll up and down lists, and left to right for moving objects.
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 Practitioner and/or Physician Assistant may be designated as an Associate Provider also. Per VHA Directive, every patient is to be assigned to a Primary Care Provider who is responsible for coordinating a patient's overall care. 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).
AUSTIN INFORMATION TECHNOLOGY CENTER (AIRC)	The central repository for National Care Patient Care Database (formerly the Austin Automation Center (AAC)).
AUTO TEAM ENROLLMENT/DISCHARGE	This is an option when setting up teams that will automatically enroll a patient to a team when the patient is enrolled in a clinic that is associated with that team. You can also discharge from a team (if not assigned to a position in a team) when the patient is discharged from a clinic associated with that team.
BUTTON BAR	Small boxes that contain graphic figures that represent various functions. Also referred to as Tool Bar.
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 selection of a date and year. This is used for activation and deactivation dates as well as discharge dates.
CLERK	This person is a clerk who performs data entry.
CLINICAL PHARMACIST	Performs patient care duties related to patient medications as assigned or granted by the appropriate governing committee at the facility. These privileges may include and may or may not be limited to: (1) Initiation of renewal orders for chronic maintenance medications (2) Initiation of orders for laboratory tests necessary to monitor existing drug therapy.
CLINICAL SERVICE	A Service defined at the medical center, e.g. MEDICINE, SURGERY, INTERMEDIATE MEDICINE, etc.
CLOSING	Another term for 'inactivating' a position or team.
CONSULTS	When a patient is referred to a clinic on a one-time basis, he/she is not normally enrolled in that clinic.
CONTROL KEY	A Control Key is the key on the lower left and right hand side of the keyboard that is entitled 'CTRL'. When a user presses this key along with another character (e.g. CTRL + O), the user can select and OPTION, etc.
DATABASE	This refers to the information that is stored in your medical center's computer program, e.g., patient information, service information, clinic information, 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 description of the object being created (in some cases, the description of what a team is supposed to represent).
DIETITIAN	Performs patient care duties related to nutrition and weight management
DISPLAY BOX	This is a 'box' or window that 'DISPLAYS' information or lists available clinics, positions or teams to choose from. The user may select an item from the list displayed.
DOUBLE ARROW	A 'double arrow' is just that (two arrows next to each other) indicating that more than one patient name may be moved over from an inactive status to an active status and back to an inactive status. (>>)
DROP DOWN LIST	When a user selects an item from the MENU BAR, a list is displayed in a vertical format. For example, if a user selects FILE, a list drops down showing all options that are available under the main heading FILE: File, Edit, Print, Save
E-MAIL MESSAGES	These are the messages that are generated by a software event that delivers information to designated users via MailMan. E-mail messages in the PCMM module would include information about death notifications, inpatient movements, consult notifications, and team notifications or changes.
ENHANCEMENT	An 'enhancement' to an already existing Class I software package is the introduction of new or improved functionality.
GUI	Graphical user Interface
FTEE	Full Time Employee Equivalent. Applies to any staffed team position.
HIGHLIGHT	To 'Highlight' a name, team, position, or date, one would place the cursor (or arrow) on the name, team, or position they wish to choose and 'click' the mouse button to select it or highlight it.
HISTORY FILE	Although not specific to any one document, a history file is a compilation of various pieces of information pertaining to individual teams, positions, etc. for future reference and clarification.
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 'cutting' 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 'buttons'.
INTERN (PHYSICIAN)	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include, but may not be limited to, (1) completing history & physical examinations, (2) obtaining blood and other specimens, and (3) provision of patient medical care as permitted. Cannot act as Primary Care Provider. The Intern is an Associate Provider within a Primary Care Team (see Associate Provider Term).
IRM	Information Resources Management
LOG OFF	This is referred to logging off or signing out of a particular software package or system. To end the session, to 'get out' of a package, etc.
LOG ON	This is referred to logging on or signing onto a particular software package or system. To open or start a new session.
MACRO	A shortcut for performing various tasks. For example, the CTRL key (as explained above), combined with certain letters performs functions or tasks without having to select a menu bar item.
MAS ADPAC	Medical Administration Service Automated Data Processing Applications Coordinator
MEDICAL STUDENT	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner.

MENU BAR	A Menu Bar is usually listed at the TOP of a computer screen and it, unlike the tool bar, displays words as opposed to pictures. For example, the menu bar for FILE OPEN can be selected, but it can also be selected from a picture of a folder opening. The menu bar is just the 'words' for various functions. The menu bar as 'drop down lists' as explained above.
MODULE	A portion of a major software package, e.g. Primary Care functionality is considered a MODULE of the Scheduling package.
NPCD	National Patient Care Database - is maintained in Austin and receives selected demographic and encounter-based clinical, diagnostic data from VA medical centers. This data enables a detailed analysis of VHA inpatient and outpatient health care activity.
NURSE (LPN)	Provides a variety of nursing services that do not require full professional nurse education, but are represented by the licensing of practical and vocational nurses by a State, Territory or the District of Columbia. Persons in these positions may also provide administrative assistance, such as making appointments, etc.
NURSE (RN)	Provides care to patients in clinics and other settings, administers anesthetic agents and supportive treatments to patients undergoing outpatient surgery and other medical treatments, promotes better health practices, and consults or advises nurses providing direct care to patients. Persons in this position require a professional knowledge and education in the field of nursing.
NURSE PRACTITIONER	Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, appropriate assessments, orders diagnostic tests and consultations as necessary, prescribes treatment interventions in accordance with established protocols, provides or arranges follow-up care, and provides health teaching and supportive 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 facilities.
OIF/OEF	Operation Iraqi Freedom/ Operation Enduring Freedom
OTHER	A general classification for those team members who do not belong in any of the listed Standard Position entries.
PANEL	A panel is a group of individual patients for which the Primary Care Provider has accepted primary care responsibility.
PATIENT PANEL	Group of individual patients assigned to Team/Position/ Practitioner. Can be either Primary Care or Non Primary Care patients; e.g., the Practitioner's Patients Report includes both Primary Care and Non Primary Care patients assigned to the practitioner or other team position in the Patient Panel Count.
PATIENT SERVICES ASSISTANT	Provides clerical and patient processing support to outpatient clinics, or other unit of a medical facility, in support of the care and treatment given to patients. This includes duties as receptionist, record-keeping duties, clerical duties related to patient care, and miscellaneous support to the medical staff of the unit.
PC COORDINATOR	Primary Care Coordinator
PCMM	Primary Care Management Module
PCs	Personal computers
PERSON CLASS FILE	Consists of provider taxonomy developed by Health Care Finance Administration (HCFA). The taxonomy codifies provider type and provider area of specialization for all medical related providers.

PHYSICIAN ASSISTANT	Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, diagnostic and therapeutic medical care and services, taking case histories, conducting physical examinations, and ordering lab and other studies. Physician Assistants also may carry out special procedures, such as giving injections or other medication, apply or change dressings, or suturing minor lacerations. The ability to act as a Primary Care Practitioner is decided by individual facilities.
PHYSICIAN-PRIMARY CARE	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific 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 practice medicine and surgery in a US State, territory or the District of Columbia. As a Primary Care practitioner, the incumbent provides the first point of assistance for a patient seeking care. Primary Care duties include: (1) Intake and initial needs assessment, (2) Health promotion and disease prevention, (3) Management of acute and chronic biopsychosocial conditions, (4) Access to other components of health care, (5) Continuity, and (6) Patient and non-professional care giver education & training. (from IL 10-93-031, Under Secretary for Health's Letter) Can act as Primary Care Practitioner.
PHYSICIAN-PSYCHIATRIST	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific 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 practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) in regard to the practice of Psychiatry.
PHYSICIAN-SUBSPECIALTY	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific 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 practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) concerning the practice of Specialty or Subspecialty care in the areas of Medicine or Surgery.
POSITION	Teams are comprised of one or more staff positions. Individual practitioners are assigned to a team position. A position is designated to serve certain roles in the overall primary care setting.
PRECEPTOR	Responsible for providing the overall care for patients 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.
PRIMARY CARE MANAGEMENT MODULE (PCMM)	Primary Care Management Module is the application for VA facilities to use for implementing primary care teams. Teams are created, positions associated with the teams are created, staff members are assigned to positions, and patients are assigned to the teams and positions.
PRIMARY CARE PROVIDER	In PCMM, the Primary Care Provider is the position determined to be responsible for the coordination of the patient's primary care.

PSYCHOLOGIST	Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family and group counseling and psychotherapy, assertiveness and other behavior training, etc.
REHAB/PSYCH TECHNICIAN	Provides patient care in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family or group counseling. A degreed Psychologist or Mental health practitioner typically supervises the incumbent.
RESIDENT (PHYSICIAN)	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include, but may not be limited to, completing history and physical examinations, obtaining blood and other specimens, and provision of patient medical care as permitted. The resident is an Associate Provider within a Primary Care Team. As a Resident, the incumbent is responsible for providing patient care as directed by the Preceptor. Cannot act as Primary Care Provider.
RIGHT CLICK	Normally on a computer 'mouse' there is two buttons at the top of the mouse. The button or area that can be 'clicked' on the right, is known as the RIGHT CLICK button.
ROLE	A function or task of a staff member involved with the implementation, maintenance and continued success of primary care.
SOCIAL WORKER	Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Social Work. Provides direct services to individuals, groups and families with counseling, discharge planning, crisis intervention, 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.
TEAM	Teams are groups of staff members organized for a certain purpose (e.g., Primary Care).
TEAM PHARMACIST	A pharmacist who: (1) Is authorized to Fill/Dispense medications (2) Enter/Verify medication orders (3) Provide patient education relating to medications (4) Renew established medications under the protocols defined by the medical center.
TEAM PROFILE	This is a screen within PCMM that shows the various characteristics of a particular team, e.g., number of patients allowed for enrollment, name, positions 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 identify certain characteristics of a particular component of PCMM. For example, the description of what a team is for (provides primary care to patients 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 bottom, and contains a picture of all of the available ICONS that may be chosen to perform certain tasks. Unlike the MENU BAR, the menu bar contains the 'words' for functions, whereas the TOOL BAR contains the 'pictures' that represent functions.
TOOL BUTTONS	A tool button is ONE of the icons that is shown across the top (or bottom) of a screen on the TOOL BAR.

TPA	Transition Patient Advocates assist in tracking the treatment of seriously ill veterans of Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF)
UNIQUES	Uniques for the purpose of PCMM Primary Care are defined as the individual veteran (patient) 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 position titles as defined by the site.
VistA	Veterans Health Information Systems and Technology Architecture, formerly known as Decentralized Hospital Computer Program, encompasses the complete information environment at VA medical facilities.

Appendix - Examples of PCMM Reports

This section provides brief examples of PCMM Reports. Selecting different options will change the content of the reports. All of the data included in the sample reports is for illustration purposes – No live data is used. Actual Reports will be much longer.

Team/Position Assignment/Re-Assignment

Note: This option may be used to assign or reassign a patient to a team. It does not generate a report.

Prior to using this option, PCMM's Graphical User Interface (GUI) must be used to:

- 1) Setup active primary care and non-primary care team(s)
- 2) Setup active PC and non-primary care Practitioner position(s)
- 3) Setup any necessary preceptor/preceptee relationships
- 4) Assign practitioner to position(s)

A patient can only have one PC team and one PC Position assignment on a given day. The patient must be assigned to a position's team to be assigned to the position.

Note: You must use the PCMM GUI if the patient was:

- o unassigned from PC assignment today or in the future
- o assigned to a future PC assignment.

Patient Listing for Team Assignments

Printed on: 3/22/2006

Patient Listing For Team Assignments

Page: 1

Division: CHEYENNE VAMC

Team: GRAY TEAM

Primary Care Team: YES

Patient Name	Pt ID	Date Assigned	PC?	Practitioner	Position	Standard Role	Preceptor
PCMPATIENT, SIX	2210	10/12/2001	PCP	PCMPROVIDER, SIX	PROV GRAY1	PHYSICIAN-PRIMARY CA	
PCMPATIENT, EIGHT	2752	04/13/2000	PCP	PCMPROVIDER, SIX	PROV GRAY1	PHYSICIAN-PRIMARY CA	
PCMPATIENT, THREE	1301	06/14/2005	PCP	PCMPROVIDER, SIX	PROV GRAY1	PHYSICIAN-PRIMARY CA	

Patient Team Position Assignment Review

```
>>> Task#: 1911                                     --
      This task will send a MailMan message to you containing
      the results of the position assignment review.
Subj: Patient Team Position Assignment Review  [#337] 03/22/06@11:30 1257 lines
From: POSTMASTER In 'IN' basket.   Page 1  *New*
-----
In order to correct the following active positions with discharged team
assignments, please refer to the documentation for the Patient Team
Position Assignment Review option found in the Stand-alone Options
Section of the PCMM User Guide.
  Teams Reviewed:
    BLUE TEAM
    GRAY TEAM
    GREEN TEAM BRAVO

  Patient Team Position Assignments Reviewed: 12290
  Number of Assignments with Problems       :   207  ( 1.68%)

=====
Team: BLUE TEAM           Position: NURSE BLUE 1
      Patient: PCMMPATIENT, FIVE (6115)
      Error: Position Unassigned Date is AFTER Team Unassigned Date
            Team Unassigned Date: 03/15/2006

Subj: Patient Team Position Assignment Review  [#337]   Page 2
-----
            Position Unassigned Date: 03/18/2006
-----
Team: BLUE TEAM           Position: PROV BLUE 1
      Patient: PCMMPATIENT, EIGHT (3551)
      Error: Position Assigned Date is BEFORE Team Assigned Date
            Position Assigned Date: 08/30/2000
            Team Assigned Date: 10/05/2000
-----
Team: BLUE TEAM           Position: PROV BLUE 1
      Patient: PCMMPATIENT, SEVEN (4587)
      Error: Position Assigned Date is BEFORE Team Assigned Date
            Position Assigned Date: 04/26/1999
            Team Assigned Date: 10/12/1999
```

Historical Patient Position Assignment Listing - Detail

Detail for Patient Position Assignments

<*> HISTORICAL PATIENT POSITION ASSIGNMENT LISTING <*>									
Detail for Patient Position Assignments Effective: MAR 23,2006 to MAR 23,2006									
Date printed: MAR 23,2006@14:29								Page: 1	
Patient Name	Pat. Id.	Primary Elig.	MT Cat	Team	Provider	Team Position	Enrolled PC? Clinic	Act. Date	Inac. Date
PCMMPROVIDER, SIX	8663	SC < 50	N	BLUE TEAM	PCMMPROVIDER, TEN	PROV BLUE 1	PCP	09/02/2003	
PCMMPROVIDER, ONE	6497	NSC	C	BLUE TEAM	PCMMPROVIDER, TEN	PROV BLUE 1	PCP	09/02/2003	
PCMMPROVIDER, TEN	7460	SC 50-100		BLUE TEAM	PCMMPROVIDER, TEN	PROV BLUE 1	PCP	09/02/2003	
NOTE: More than one provider may be associated with a single patient position assignment. This output returns a separate output line for each related provider during the date range selected.									
'PC?' represents provider type: AP = Associate provider, PCP = Primary Care Provider, NPC = Non-Primary Care Provider.									

Historical Patient Position Assignment Listing - Summary

Summary for Patient Position Assignments

```

-----
<*> HISTORICAL PATIENT POSITION ASSIGNMENT LISTING <*>
Summary for Patient Position Assignments Effective: MAR 23,2006 to MAR 23,2006
-----
Date printed: MAR 23,2006@14:29                                     Page: 63
-----

```

Category	Count	Percent

--PRIMARY ELIGIBILITY--		
AID & ATTENDANCE	2	0.40
CHAMPVA	3	0.61
HUMANITARIAN EMERGENCY	1	0.20
NSC, VA PENSION	14	2.83
NSC	255	51.62
PURPLE HEART RECIPIENT	3	0.61
SC LESS THAN 50%	151	30.57
SERVICE CONNECTED 50% to 100%	64	12.96
TRICARE	1	0.20

```

-----
NOTE: More than one provider may be associated with a single patient position assignment. The sum of assignments related to
providers detailed in this summary is likely to be greater than the actual number of patient position assignments
returned by this report.
-----

```

Patients Scheduled for Inactivation from PC Panels

Patients Scheduled for Inactivation from PC Panels

MAR 23,2006 14:41 PAGE 1

Patient Name	SSN	Institution	PC Team	Provider	Team Position	Date Sched. to Inactivate	Next Appt. Date/Clinic
PCMPATIENT, ONE	3822	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, TEN	PROV BLUE 2	03/18/06	MAR 30,2006@08:00 PODIATRY
PCMPATIENT, TWO	0750	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, TEN	PROV BLUE 2	03/16/06	
PCMPATIENT, SIX	1437	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, SIX	PROV BLUE 3	03/16/06	
PCMPATIENT, TEN	3965	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, ONE	PROV BLUE 6	03/22/06	APR 12,2006@09:00 ELDRED REM
PCMPATIENT, FOUR	9659	CHEYENNE VAMC	GREEN TEAM	PCMMPROVIDER, TWO	PROV GREEN 4	03/22/06	JUN 7,2006@09:00 EVANS REMI

Patients with Extended Primary Care Inactivation

PCMM Patients with extended Inactivations

MAR 23,2006 14:50 PAGE 1

Patient	SSN	Institution	PC Team	Provider/ Position	Preceptor/ Position	Date Sched. for Inactivation/ Reason
PCMPATIENT, ONE	2847	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, TWO PROV BLUE 1		03/19/06 PATIENT HAS FUTURE PC APPOINTMENT
PCMPATIENT, TWO	8539	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, SIX PROV BLUE 2		03/19/06 PATIENT CONTACTED SITE FOR APPOINTME
PCMPATIENT, SIX	3822	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, SIX PROV BLUE 2		03/21/06 PROVIDER REQUEST-WILL CONTACT PATIEN

COUNT 3

Column Heading	Explanation of column headings
Patient Name	Name of patient scheduled to be inactivated from their primary care team and position/provider.
SSN	Patient's last 4 SSN numbers.
Institution	Institution name, previously called Division, in which patient receives primary care.
PC Team	The patient's assigned Primary Care team in PCMM.
Provider/ Team Position	Name of Associate Primary Care Provider (AP) assigned to patient, if there is one. The name of the team position to which the Associate Primary Care Provider (AP) is assigned.
Current Preceptor/ Team Position	Name of Primary Care Provider (PCP) assigned to patient. Every Primary Care patient should be assigned to one PCP. The name of the team position to which the Primary Care Provider (PCP) is assigned.
Date Scheduled for Inactivation	Date patient will be inactivated from PCMM and their Primary Care team and provider/position unless they have a completed outpatient appointment encounter with their current PCP or AP before this date. Note: There is a patient reassignment option, which allows an inactivated patient to be reactivated to their previous Primary Care team and position if they return for care.
Reason for Extended Inactivation	The reason entered for extending the patient's time before inactivation from PC panels. Entry of this field is in the PCMM GUI, Patient drop down menu, and the Extend Patient's Date for Inactivation from PC Panels option.

Patients Automated Inactivations from PC Panels

AUTOMATED PATIENT INACTIVATION FROM PRIMARY CARE PANELS REPORT

MAR 23, 2006 14:52 PAGE 1

Patient Name	SSN	Institution	PC Team	Provider/Team Position	Preceptor/Team Position	Date PT Inactivated	Reason Patient Inactivated
PCMMPATIENT, FOUR	2015	CHEYENNE VAMC	FORT COLLINS TE	PCMMPROVIDER, SEVEN PROV FC2		02/22/06	NO APPT
PCMMPATIENT, TEN	0860	CHEYENNE VAMC	FORT COLLINS TE	PCMMPROVIDER, SEVEN PROV FC2		02/22/06	NO APPT
PCMMPATIENT, NINE	8056	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, FIVE PROV BLUE 1		02/22/06	NO APPT
PCMMPATIENT, NINE	3161	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, TEN PROV BLUE 2		02/22/06	NO APPT

REPORT KEY

Field Name	Explanation of field name
Patient Name	Name of patient scheduled to be inactivated from their primary care team and position/provider.
SSN	Patient's last 4 SSN numbers.
Institution	Institution name, previously called Division, in which patient receives primary care.
PC Team	Patient's assigned Primary Care team in PCMM.
Provider/	Name of Primary Care practitioner/provider currently assigned to the patient. This may be an Associate PC Provider (AP,) if the patient is assigned to an AP, or it may be a Primary Care Provider (PCP) if the patient is not assigned to an Associate PC Provider (AP.)
Team Position	The name of the team position to which the current provider is assigned.
Preceptor	Name of Preceptor/Primary Care Provider (PCP) if the patient is assigned to an Associate Provider. If this field is blank then the patient is assigned to a PCP, who displays in the Provider field.
Date Patient Inactivated	Date patient was inactivated from PCMM and their Primary Care team and provider/position. Note: There is a PCMM patient re-assignment option.
Reason Patient Inactivated	Reason for patient's automated unassignment from their Primary Care team and provider/position. No Appt The patient has been assigned to their current Primary Care Provider (PCP) for 12 months, and does not have a completed appointment encounter with their PCP or any assigned Associated Primary Care Provider (AP) within those 12 months. Therefore, they are considered an inactive patient. Alternatively, the patient has been assigned to their current PCP for at least 12 months, and does not have a completed appointment encounter with their PCP or any assigned Associated Primary Care Provider (AP) in the past 24 months. Therefore, they are considered an inactive patient. Death - Patient's death, a date of death was entered in the Registration Package

Extend Patient Inactivation Date

Note : By selecting this option and specifying one or more teams, a list of patients scheduled for inactivation is generated.
Choose patients from this list , one at a time, to automatically extend the inactivation date for 60 days.

Select PATIENT REPORTS AND OPTIONS Option: EXTP Extend Patient Inactivation Date

Select TEAM NAME: BLUE

1 BLUE TEAM

2 BLUE TEAM BRAVO

CHOOSE 1-2: 1 BLUE TEAM

Searching...

Select From:

1 PCMMPATIENT, TWELVE

2 PCMMPATIENT, EIGHT

3 PCMMPATIENT, SIX

4 PCMMPATIENT, THIRTEEN

5 PCMMPATIENT, THREE

6 PCMMPATIENT, NINE

Select 1-16 2

EXTEND AUTOMATIC INACTIVATION: DO NOT EXTEND// ?

Enter if you wish to extend this automatic inactivation date by 60 days

Choose from:

0 DO NOT EXTEND

1 PATIENT HAS FUTURE PC APPOINTMENT

2 PROVIDER REQUEST-WILL CONTACT PATIENT

3 PATIENT CONTACTED SITE FOR APPOINTMENT

4 OTHER

PCMM Edit Practitioner in Position Assig. File

Note: This option will allow the use to edit an invalid Practitioner Entry if any invalid Entries exist.

PCMM Edit Practitioner in Position Assig. File

Select PROVIDER/POSITION REPORTS AND OPTIONS Option: EP PCMM Edit Practitioner in Position Assig. File

EDITING INVALID PRACTITIONER ENTRY

No Entries found

I

Practitioner Demographics

Note: After selecting one or more Practitioners, demographic information is displayed.

```
Printed on: 3/27/2006      Practitioner Demographics      Page: 2

Name: PCMMPROVIDER, TWELVE      Serv./Sect.: MEDICAL SERVICE - PROVIDER
Team: GREEN TEAM                Position: PROV GREEN 3
Role: PHYSICIAN-PRIMARY CARE    User Class:
Room:                           Pts. Allowed: 240
Phone: 7177                     Pts. Assigned: 226
Assoc.
Clinic: Osteo Clinic
Person
Class: Allopathic and Osteopathic Physicians
      Internal Medicine
```

Practitioner's Patients

Printed on: 5/1/2006 Practitioner's Patients Page: 1

Team: BLUE TEAM CHANGED
 Division: CHEYENNE VAMC
 Practitioner: PCMMPROVIDER, SEVEN (PROV BLUE 7)

Pt Name	Pt ID	M.T. Stat	Prim Elig	Last Appt	Next Appt	Clinic
PCMMPATIENT, SIX	6029	A	NSC	12/16/2005	06/14/2006	CARDIO
PCMMPATIENT, SEVEN	8189	A	NSC	10/05/2005	09/13/2006	CARDIO
PCMMPATIENT, EIGHT	6972		SC < 50	09/09/2005		CARDIO
PCMMPATIENT, NINE	9824		CHAMPVA	05/24/2005		CARDIO
PCMMPATIENT, TEN	9640	C	NSC	07/23/2004		CARDIO

Historical Provider Position Assignment Listing

Detail for Provider Position Assignments Effective: APR 1,2006 to MAY 1,2006

Date printed: MAY 1,2006@16:20

Page: 1

Provider Name	Position	PC?	Team	Associated Clinic	Max. Pts. Allow.	---Assigned--- ---Patients---	Open Slots	---Precepted--- ---Patients---		
						PC	Non-PC	PC	Non-PC	
PCMPATIENT, ONE	HBPC PROVIDER 11	YES	HOME BASED PC TEAM	NUTRITION	5	1	0	4	0	0
PCMPATIENT, TWO	PROV GREEN 2	YES	GREEN TEAM	CARDIO	375	480	0	0	0	0
PCMPATIENT, TWO	HBPC PROVIDER 2	YES	HOME BASED PC TEAM	CARDIO	5	3	0	2	0	0
PCMPATIENT, THREE	PROV BLUE 1	YES	BLUE TEAM CHANGED	OSTEOPATHIC	600	493	1	106	0	0
PCMPATIENT, THREE	HBPC PROVIDER 1	YES	HOME BASED PC TEAM	OSTEOPATHIC	5	2	0	3	0	0

NOTE: This report reflects a count of all unique patients assigned to Primary Care and non-Primary Care within the date range selected. If a date range larger than one day has been selected, the total patients assigned to a provider may be greater than the maximum defined for the position. However, this does not imply that the provider had more than their maximum number of patients on any single date.

PCMM Inconsistency Report

```

      <Detailed by Patient>
      PCMM INCONSISTENCY REPORT
      May 02, 2006@08:11
=====
Teams: All teams
=====
POSITION INCONSISTENCIES
-----
INCONSISTENCY
TEAM          POSITION
Position has no staff assigned
GRAY TEAM     PROV GRAY1
SIDNEY TEAM   SIDNEY PROV1
SWO TEST TEAM 1 DOCTOR 1
PATIENT INCONSISTENCIES
-----
PATIENT          SSN
INCONSISTENCY
TEAM          POSITION
PCMPATIENT, NINE 666982232
Position assignment with inactive Team Assignment
SWO TEST TEAM 1  NURSE 1
PCMPATIENT, TWELVE 666011265P
Position assignment with inactive Team
BLUE TEAM BRAVO  PROV BLUE B1

```

FTEE and Panel Size Report

FTEE AND PANEL SIZE

MAR 8, 2012 15:02 PAGE 1

Provider's Name	Team	Team Position	AP or PCP	Associated Clinic	FTEE	Patients for Position Actual/ Active	Patients for Position Allowed/ Maximum	Available Patient Openings	Adjusted Panel Size
PCMMPROVIDER, ONE	AUTO TEAM	MEMBER2	PCP	CECELIA'S CARDI		0	0	0	0
PCMMPROVIDER, TWO	AUTO TEAM	MEMBER1	PCP			1	0	(1)	0
PCMMPROVIDER, THREE	BLUE	BLUE PHYSICIAN	PCP			0	0	0	0
PCMMPROVIDER, FOUR	BLUE	PHYS1	PCP		1.00	1	0	(1)	1
PCMMPROVIDER, FIVE	BRAD TEST	BLUE2	PCP			0	40	40	0
PCMMPROVIDER, SIX	BRAD TEST	BLUE	PCP			0	40	40	0
PCMMPROVIDER, SEVEN	NEW FTEE RULES	NEW PRECEPTOR	PCP		0.30	0	100	100	0
DICKENSON, EMILY	NEW FTEE RULES	NEW RESIDENT				0	0	0	0
PCMMPROVIDER, EIGHT	RJV TEST	RJV INTERN	PCP			0	25	25	0
COLLINS, WILKIE	RJV TEST TEAM	MEMBER1				0	0	0	0
BRONTE, CHARLOTTE	RJV TEST TEAM	MEMBER2				0	0	0	0
BRONTE, EMILY	ROB	DOC PRECEPTOR			0.60	2	99	97	3
PCMMPROVIDER, NINE	ROB	DOC 1	PCP	REW TEST NEW		3	1	(2)	0
PCMMPROVIDER, TEN	ROB	DOC RESIDENT	PCP	MIKE'S MURKY MA		1	66	65	0
DICKENS, CHARLES	ROB	DOC INACTIVATE				0	77	77	0
WOOLF, VIRGINIA	ROB	SOCIAL TESTED				0	20	20	0
PCMMPROVIDER, ELEVEN	ROSS TEST	ROSS PROVIDER 1	PCP		1.00	0	100	100	0
PCMMPROVIDER, TWELVE	STEVES Y2K	DOCTOR	PCP	STEVE'S CLINIC		0	20	20	0
PCMMPROVIDER, THIRTEEN	TEST 1	STAFF PHYSICIAN 1	PCP			0	0	0	0
PCMMPROVIDER, FOURTEEN	TESTING NEW TEAM	TESTING NEW TEAM	PCP			0	1	1	0
SPURGEON, DR	TH TEST	PHYSICIAN 1			1.00	0	100	100	0
LAMB, CHARLES	CECELIA'S TEAM	PRIMARY CARE			0.50	0	2	2	0
PCMMPROVIDER, FIFTEEN	GREEN	PROVIDER2	PCP		0.90	1	3	2	1
					5.30	9	694	689	
TOTAL									

REPORT KEY	
Column Heading	Explanation of column heading.
Provider's Name	The name of the Provider.
TEAM	The name of the team to which this position (and therefore provider) is assigned.
Team Position	The name of the team position to which this provider is assigned.
AP or PCP	This column displays whether this provider is an Associate Primary Care Provider (AP) or a Primary Care Provider (PCP).
Associated Clinic(s)	The scheduling clinic(s) associated with this position/provider in the PCMM software.
FTEE	The number of hours the provider spends providing care expressed as a Full-Time Employee Equivalent Examples: One FTEE=1.00=40 hours per week. 0.75 FTEE=30 hours per week. 0.50 FTEE=20 hours per week. Percent FTEE is equal to $100 \times \text{the FTEE number on this report}$. For example $\text{FTEE}=0.75=75\%$.
Patients for Position Allowed	This represents the total maximum number of patients this provider is expected to care for on this panel. This number is entered in the PCMM GUI 'Primary Care Team Position Setup' window on the 'Settings' tab. Additional patients above this number may be assigned to the provider depending on local management policy.
Patients for Position Actual	The actual current number of active patients assigned to this provider in PCMM at the time of this report. This number displays on the PCMM GUI 'Primary Care Team Position Setup' window on the 'Settings' tab different FTEE values. Example, Active patients 500/0.85 FTEE=588. This is the number of patients this provider would be expected to provide primary care for if their FTEE=1.0.
FTEE and Panel Size Total	The total number of FTEE, patients for positions allowed, patients for positions actual, and available patient opening for this report. If this report is sorted on Associated Clinic, then subtotals for each clinic and a total for the entire report print. If this report is sorted on Team, then subtotals for each team and a total for the entire report print.

Staff Sched for Inactivation

WARNING- THE FOLLOWING PRIMARY CARE STAFF ARE SCHEDULED FOR AUTOMATED INACTIVATION FROM PCMM SOFTWARE UNLESS APPROPRIATE AND CONSISTENT ENTRIES ARE ENTERED IN THE NEW PERSON FILE AND THE TEAM POSITION FILE IN ACCORDANCE WITH PRIMARY CARE AND PCMM BUSINESS RULES IN VHA DIRECTIVE 2003-022. (NOTE: The staff's 'Person Class' is in the 'New Person' file, File #200, sub-file 8932.1 and field .01. The staff person's 'Role' is entered in the PCMM GUI, in the 'Primary Care Position Setup' window on the 'Settings' tab. 'Role' is saved in the 'Team Position' file 404.57, 'Standard Role Name' field .03). Following entry of correct and consistent file entries, staff will be removed from this report the next time the staff inactivation routine runs, which is the last day of each month.

These are the Primary Care and PCMM business rules:

- 1.) Primary care providers and staff designated as Primary Care Providers (PCPs) in PCMM, that are not a Primary Care physician (Medical Doctor or Doctor of Osteopathy) Nurse Practitioner (NP) or Physician Assistant (PA) will be inactivated in the PCMM software.
- 2.) Primary care providers and staff designated as Associate Primary Care Providers (APs,) that are not a Primary Care Resident/Intern (Physician,) Nurse Practitioner (NP,) or Physician Assistant (PA,) will be inactivated in the PCMM software.
- 3.) All staff, which are designated as a Primary Care Provider (PCP) or an Associate Primary Care Provider (AP) who do not have an appropriate 'Person Class' entry consistent with their 'Standard Role Name' in Vista Fileman, will be inactivated from their primary care position in PCMM software.
- 4.) Staff inactivation's will occur six months after installation of this patch, SD*5.3*297.

Please contact the PCMM Coordinator or Information Systems (IRMS) department for assistance in resolving any problems.

Primary Care Staff Scheduled for Inactivation

MAY 1,2006 17:13 PAGE 1

Name	Team Position	Assoc. Clinic(s)	Role	Person Class	# Of Pts.	Sched. Inact. Date	Inconsistency Reason
INSTITUTION: CHEYENNE VAMC							
TEAM: GRAY TEAM							
PCMMPROVIDER.TEN	PROV GRAY1	EVENING PRIMARY	PHYSICIAN-PRIMA	Allopathic and	55	08/31/06	
TEAM: HOME BASED PC TEAM							
PCMMPROVIDER.TEN	PROVIDER 1	EVENING PRIMARY	PHYSICIAN-PRIMA	Allopathic and	24	08/31/06	PersonClass not valid
PCMMPROVIDER.ONE	NUTRITION	DIETITIAN	Dietary and Nut		24	08/31/06	Role not=PCprovider
TOTAL					103	24	
COUNT						3	
MEAN						8.00	
MINIMUM						08/31/06	
MAXIMUM						08/31/06	

Appendix - Examples of PCMM Reports

Institution	<u>Institution</u> name, previously called Division, in which provider sees primary care patients.
PC Team	Staff person's Primary Care team in PCMM software.
Name	<u>Name</u> of staff inactivated from their primary care position in PCMM software.
Team Position	The name of the team position to which the staff was assigned.
Associated Clinic	Associated Clinic(s) where provider saw primary care patients. 'Associated Clinics' display in the PCMM GUI, 'Primary Care Position Setup' window, on the 'Associated Clinics' tab and are saved in the Team Position file 404.575 and .01 field, 'Associated Clinics'.
Role	The function this position serves, as entered in PCMM GUI on the 'Primary Care Position Setup' window, 'General' tab and saved in the Team Position file 404.57, Standard Role Name field .03. Examples: Physician, Nurse Practitioner, Resident, Intern, Social Worker, or Psychologist.
Person Class	Nationally used clinician identifier for provider types from the New Person file #200, sub-file 8932.1, and field .01, for example, Physicians (MD and DO).
# Pts Assigned	The number of primary care patients currently assigned to this provider's position. This number, 'Patients for Position: Actual', displays in the PCMM GUI 'Primary Care Position Setup' window on the 'Settings' tab and is a count of the number of patients assigned to this provider position at the time of this report.
Scheduled Inactivate Date	<u>Date</u> staff will be inactivated from their Primary Care position in the PCMM software, if the staff's 'Role' and 'Person Class' aren't appropriate and consistent with Primary Care business rules.
Reason for Inconsistency/ Inactivation	The reason causing this primary care staff or provider's inactivation. Their 'Role' and 'Person Class' must be consistent and appropriate for their assignment in
Column	Explanation PCMM. Please refer to the Warning at the top of this report. 'Role not=PC provider' means the 'Standard Role Name' entered in file 404.57, .03 is not a valid role for this position to be a primary care provider. For example, Social Workers, Dietitians, Psychologists and others may not be indicated as providing primary care or be AP's or PCP's in PCMM according to the Primary Care business rules in VHA Directives. 'Person Class not valid' means this person's entry in the New Person file #200 is not congruent with being the type of primary care provider entered in PCMM. For example, a Resident may not be a PCP in PCMM.
Total	Sums the number of patients who will be or were effected by practitioners inactivation's from PCMM.
Count	A total count of the number of staff positions scheduled for inactivation or were inactivated.

Staff Inactivated Report

WARNING- THE FOLLOWING PRIMARY CARE STAFF ARE SCHEDULED FOR AUTOMATED INACTIVATION FROM PCMM SOFTWARE UNLESS APPROPRIATE AND CONSISTENT ENTRIES ARE ENTERED IN THE NEW PERSON FILE AND THE TEAM POSITION FILE IN ACCORDANCE WITH PRIMARY CARE AND PCMM BUSINESS RULES IN VHA DIRECTIVE 2003-022. (NOTE: The staff's 'Person Class' is in the 'New Person' file, File #200, sub-file 8932.1 and field .01. The staff person's 'Role' is entered in the PCMM GUI, in the 'Primary Care Position Setup' window on the 'Settings' tab. 'Role' is saved in the 'Team Position' file 404.57, 'Standard Role Name' field .03). Following entry of correct and consistent file entries, staff will be removed from this report the next time the staff inactivation routine runs, which is the last day of each month.

These are the Primary Care and PCMM business rules:

- 1.) Primary care providers and staff designated as Primary Care Providers (PCPs) in PCMM, that are not a Primary Care physician (Medical Doctor or Doctor of Osteopathy) Nurse Practitioner (NP) or Physician Assistant (PA) will be inactivated in the PCMM software.
- 2.) Primary care providers and staff designated as Associate Primary Care Providers (APs,) that are not a Primary Care Resident/Intern (Physician,) Nurse Practitioner (NP,) or Physician Assistant (PA,) will be inactivated in the PCMM software.
- 3.) All staff, which are designated as a Primary Care Provider (PCP) or an Associate Primary Care Provider (AP) who do not have an appropriate 'Person Class' entry consistent with their 'Standard Role Name' in Vista Fileman, will be inactivated from their primary care position in PCMM software.
- 4.) Staff inactivation's will occur six months after installation of this patch, SD*5.3*297.

Please contact the PCMM Coordinator or Information Systems (IRMS) department for assistance in resolving any problems.

Primary Care Staff Scheduled for Inactivation

APR 5,2006 15:28 PAGE 1

Name	Team Position	Assoc. Clinic(s)	Role	Person Class	# Of Pts.	Sched. Inact. Date	Inconsistency Reason

*** NO RECORDS TO PRINT ***

Individual Team Profile

Printed on: 4/5/2006

Individual Team Profile

Page: 1

Team Description:

Blue Primary Care Team Bravo

Team Position	Provider Name	Standard Role	PC?	Patients Allowed	Patients Assigned	Associated Clinic
PROV BLUE B1	PCMMPROVIDER, TEN	PHYSICIAN-PRIMARY CARE	NPC	0	0	CARDIO
PROV BLUE B2	PCMMPROVIDER, FIVE	NURSE PRACTITIONER	NPC	0	0	
PROV BLUE B3	PCMMPROVIDER, THREE	PHYSICIAN-PRIMARY CARE	NPC	0	0	OSTEO

Team Member Listing

Printed on: 4/5/2006

Team Member Listing

Page: 1

Division: CHEYENNE VAMC
 Team Name: BLUE TEAM BRAVO
 Primary Care Team: YES

Team Phone: 778-7555

Members:

PCMPATIENT, ELEVEN Position: PROV BLUE B2
 Standard Role: NURSE PRACTITIONER
 User Class:
 MEDICAL SERVICE - PROVIDER Assoc Clinic:
 Office Phone: 8877 Room:
 Begin Date: 11/01/1998 End Date:
 Person Class: Physician Assistants and Advanced Practice Nursing Providers
 Nurse Practitioner
 Family

Printed on: 4/5/2006

Team Member Listing

Page: 2

Division: CHEYENNE VAMC
 Team Name: BLUE TEAM BRAVO
 Primary Care Team: YES

Team Phone: 778-7555

Members:

PCMPATIENT, TWELVE Position: PROV BLUE B1
 Standard Role: PHYSICIAN-PRIMARY CARE
 User Class:
 MEDICAL SERVICE Assoc Clinic: OSTEO PC
 Office Phone: 8787 Room:
 Begin Date: 11/01/1998 End Date:
 Person Class: Allopathic and Osteopathic Physicians
 Family Practice

Team Patient Listing

Printed on: 5/1/2006

Team Patient Listing

Page: 1

Division: CHEYENNE VAMC

Team: BLUE TEAM

Team Phone: 778-7555

Primary Care Team: YES

Team Description:

Blue Primary Care Team

[Not Assigned] = Patient assigned to Team but not to a position/provider

[Inactive Position] = Patient assigned to Team & Position but has no active provider

Patient Name	Pt ID	Practitioner	Role	PC?	Last Appt.	Next Appt.	Associated Clinic
PCMPATIENT, ONE	5938	PCMMPROVIDER, SIX	NURSE PRACTITIONER	PCP	09/07/2005		CARDIO
PCMPATIENT, SEVEN	6027	PCMMPROVIDER, SIX	NURSE PRACTITIONER	PCP	02/02/2006		OSTEO
PCMPATIENT, TWO	9680	PCMMPROVIDER, TEN	PHYSICIAN-PRIMARY CARE	PCP	12/29/2005		CARDIO
PCMPATIENT, EIGHT	0101	PCMMPROVIDER, EIGHT	NURSE PRACTITIONER	PCP	06/08/2005	06/02/2006	OSTEO
PCMPATIENT, TWELVE	7449	[Inactive Position]	PHYSICIAN-PRIMARY CARE	PCP			EVENING PRIMARY CARE
PCMPATIENT, THREE	6774	[Not Assigned]					

Summary Listing of Teams

Division: CHEYENNE VAMC

Team Name: BLUE TEAM

Practitioner	Position	PC?	Standard Role	Associated Clinic	Max. Pts. Allow.	--Assigned-- --Patients-- PC	NonPC	--Precepted-- --Patients-- PC	NonPC
=====									
Printed on: 5/1/2006					Summary Listing of Teams			Page: 1	
PCMMPROVIDER, ONE	NURSE BLUE 6	NPC	NURSE (RN)		0	0	0	0	0
PCMMPROVIDER, TWO	PROV BLUE 2	PCP	NURSE PRACTITIONER	CARDIO	522	540	0	0	0
PCMMPROVIDER, THREE	PROV BLUE 1	PCP	PHYSICIAN-PRIMARY CA	CARDIO	600	491	1	0	0
PCMMPROVIDER, FOUR	NURSE BLUE 1	NPC	NURSE (RN)		0	0	0	0	0

Historical Patient Assignment Detail

```
-----
      <*>  HISTORICAL PATIENT ASSIGNMENT DETAIL  <*>
      For assignments effective OCT 7,2008 to OCT 7,2008
-----
Date printed: OCT 7,2008@14:22                               Page: 1
-----
Patient: PCMMPATIENT, SIX  SSN: 666014621  DOB: JUL 21,1954  AGE: 54  FEMALE
-----
Assignment              Active      Inactive    Assigned by/date
-----
PC Provider:
PCMMPROVIDER, ONE      10/05/2004          PCMMUSER, ONE (10/05/2004)

PC Associate Provider:  (none found)

PC Position:
PROV GREEN 6           10/05/2004          PCMMUSER, ONE (10/05/2004)
User Entering:
Last Edited By:
Status:

PC Preceptor Position:  (none found)
```


Historical Provider Position Assignment Listing

<*> HISTORICAL PROVIDER POSITION ASSIGNMENT LISTING <*>
 Detail for Provider Position Assignments Effective: APR 2,2006 to MAY 2,2006

Date printed: MAY 2,2006@08:24

Page: 1

Provider Name	Position	PC?	Team	Associated Clinic	Max. Pts. Allow.	---Assigned--- ---Patients---	Open Slots	---Precepted--- ---Patients---	
						PC	Non-PC	PC	Non-PC
PCMMPROVIDER, TEN	HBPC PROVIDER 15	YES	HOME BASED PC TEAM		5	0	0	5	0
PCMMPROVIDER, SIX	SW GREEN 1	NO	GREEN TEAM		0	0	0	0	0
PCMMPROVIDER, TWO	SW GREEN B1	NO	GREEN TEAM BRAVO		0	0	0	0	0
PCMMPROVIDER, NINE	PROV FC2	YES	FORT COLLINS TEAM	FT COLLINS BREDE	837	815	0	22	0
PCMMPROVIDER, ONE	NURSE 1	NO	SWO TEST TEAM 1		12	0	2	10	0

NOTE: This report reflects a count of all unique patients assigned to Primary Care and non-Primary Care within the date range selected. If a date range larger than one day has been selected, the total patients assigned to a provider may be greater than the maximum defined for the position. However, this does not imply that the provider had more than their maximum number of patients on any single date.

Historical Patient Position Assignment Listing

<*> HISTORICAL PATIENT POSITION ASSIGNMENT LISTING <*>										
Detail for Patient Position Assignments Effective: APR 2,2006 to MAY 2,2006										
Date printed: MAY 2,2006@08:38									Page: 1	
Patient Name	Pat. Id.	Primary Elig.	MT Cat	Team	Provider	Team Position	PC?	Enrolled Clinic	Act. Date	Inac. Date
PCMPATIENT, NINE	9570	SC < 50		GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
PCMPATIENT, TEN	7452	SC 50-100		GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
PCMPATIENT, TWO	7591	NSC	A	GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
PCMPATIENT, EIGHT	7437	NSC	A	GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
PCMPATIENT, SEVEN	5888	SC < 50		GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
PCMPATIENT, THREE	8769	SC 50-100		GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
PCMPATIENT, ONE	2625	SC 50-100		GREEN TEAM	PCMMPROV, SIX	PROV GREEN 1	PCP	OSTEO PC	11/01/1998	
NOTE: More than one provider may be associated with a single patient position assignment. This output returns a separate output line for each related provider during the date range selected.										
'PC?' represents provider type: AP = Associate provider, PCP = Primary Care Provider, NPC = Non-Primary Care Provider.										

Historical Team Assignment Summary

<*> HISTORICAL TEAM ASSIGNMENT SUMMARY <*>

Summary of Team and Team Position Assignments Effective: APR 2,2006 to MAY 2,2006

Date printed: MAY 2,2006@08:44

Page: 1

Division		Max.	Team	Team	--Team Position--	--Team Position--	Total		Pts w/o	Pts w/o		
Team	PC?	Pts.	Assign.	Uniques	---Assignments---	---Unique Pts.---	Unique	Open	Pos.	Team		
					PC	Non-PC	Pts.	Slots	Assign.	Assign.		
CHEYENNE VAMC	YES	9317	9284	9236	8932	7	8928	6	9237	1034	350	1
BLUE TEAM BRAVO	YES	0	2	2	0	1	0	1	2	0	1	0
BLUE TEAM CHANGED	YES	3300	3730	3730	3668	2	3668	2	3730	0	62	0
CHEYENNE PC UNASSIGNED	NO	0	0	0	0	0	0	0	0	0	0	0
GREEN TEAM	YES	1	0	0	0	0	0	0	0	1	0	0
FORT COLLINS TEAM	YES	1916	2241	2241	2171	0	2170	0	2241	0	71	0

NOTE: This report represents a count of team and team position assignments within the date range selected. If a date range larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined for the team, reducing the open slots reflected by this report accordingly. However, this does not imply that the team had more than its maximum number of patients on any single date.

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