Recall Reminder Installation Guide

PIMS V. 5.3 Scheduling Module
Patch SD*5.3*536
Patch OR*3.0*302

September 2009

Revision History

Initiated on 9/1/09

Date	Description (Patch # if applic.)	Project Manager	Technical Writer
9/1/09	Patch SD*5.3*536 and Patch OR*3.0*302 - Recall Reminder	REDACTED	REDACTED

Revision History

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Introduction

This manual covers one-time information for the installation of Recall Reminder Version 1.0. Other information required to maintain this application is included in the Recall Reminder Technical and Security Guide and the Recall Reminder User Guide.

The Recall Reminder software is designed to allow facilities to implement recall scheduling. The software creates a 'holding' area for patients who are to return to clinic areas in more than 90 to 120 days.

Installation

All the required patches are contained in the HFS file: SD_5_3_P536.KID.

Contents of SD_5_3_P536.KID are as follows.

Patch	Subject
SD*5.3*536	Recall Reminder application
OR*3.0*302	Recall Reminder

Software Retrieval

The SD_5_3_P536.KID file contains all the software and documentation necessary to install Recall Reminder. These files are available in the Office of Information Field Office (OIFO) ANONYMOUS.SOFTWARE directories listed below.

OIFO	FTP Address	Directory
REDACTED		

The files listed above may be obtained via FTP. The preferred method is to FTP the files from: download.vista.med.va.gov

Patch Installation

Installation should take less than 5 minutes; however, we recommend that you perform this installation at non-peak requirement hours.

Follow these steps:

1. Download the KIDS file SD_5_3_P536.KID from the ANONYMOUS.SOFTWARE directory to the appropriate directory on your system.

2. From the Kernel Installation & Distribution System menu, select the Installation menu.

3. From the Installation menu, select the LOAD A DISTRIBUTION option and load SD_5_3_P536.KID.

4. From this menu, you may elect to use the following options (when prompted for INSTALL NAME, enter SD*5.3*536).

    a. Backup a Transport Global – this patch contains routines in a new namespace, therefore there are no routines to back up.

    b. Compare Transport Global to Current System – this patch only contains new components not previously released, therefore there is nothing to compare.

    c. Verify Checksums in Transport Global - this option will ensure the integrity of the routines that are in the transport global.

    d. Print Transport Global – this option allows you to view the contents of the transport global.

5. Use the Install Package(s) option and select the package SD*5.3*536.

6. When prompted:

   `Enter the Coordinator for Mail Group 'SDRR BAD ADDRESS':` <enter appropriate name>

7. When prompted:

   `Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//` **NO**

8. When prompted:
   `Want KIDS to INHIBIT LOGONs during the install? YES//` **NO**

9. When prompted:

   `Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES//` **NO**

Installation Example

```
Select INSTALL NAME: SD*5.3*536      Loaded from Distribution
7/8/09@11:13:41
     => RECALL BUNDLE V1.0  ;Created on Jul 08, 2009@10:50:18

This Distribution was loaded on Jul 08, 2009@11:13:41 with header of
   RECALL BUNDLE V1.0  ;Created on Jul 08, 2009@10:50:18
   It consisted of the following Install(s):
     SD*5.3*536    OR*3.0*302
Checking Install for Package SD*5.3*536

Install Questions for SD*5.3*536

Checking Install for Package SD*5.3*536

Install Questions for SD*5.3*536

Incoming Files:


    403.5     RECALL REMINDERS

    403.51    RECALL REMINDERS APPT TYPE

    403.52    RECALL REMINDERS LETTERS

    403.53    RECALL REMINDERS PARAMETERS

    403.54    RECALL REMINDERS PROVIDERS

    403.55    RECALL REMINDERS TEAM

    403.56    RECALL REMINDERS REMOVED

Incoming Mail Groups:

Enter the Coordinator for Mail Group 'SDRR BAD ADDRESS': POC,FORRECALL

Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//

Checking Install for Package OR*3.0*302
Install Questions for OR*3.0*302

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

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

DEVICE: HOME//
```

Routine Checksums

SD_5_3_P536.KID Routine CHECK1^XTSUMBLD values.

*SD*5.3*536*

SDRR1	13934931
SDRR5	9146765
SDRRC15	35948677
SDRRC16	36122202
SDRRC17	35448060
SDRRC18	38268527
SDRRC20	61232869
SDRRCLR	6432300
SDRRCLR2	10431466
SDRRCRR	75514794
SDRRCRR1	30605766
SDRRCRRP	40214532
SDRRDEL	3357699
SDRRINQ	72514446
SDRRINQ1	55827759
SDRRISB	778508
SDRRISRA	33542930
SDRRISRD	26348770
SDRRISRL	31811224
SDRRISRU	13362967
SDRRISRX	30760645
SDRRLRP	1446323
SDRROR	3486735
SDRRPXC	35140878
SDRRRECL	83067983
SDRRRECP	67349870
SDRRSEG3	2988411
SDRRSLC1	40514848
SDRRSLCT	60537302
SDRRTSK	13148697
SDRRTSK1	7882942
SDRRUTL	34000828
SDRRUTL1	26580492

*OR*3.0*302*

ORWCV	79773226

Post Installation

1. If your facility has a version of Walla Walla Clinic Recall, you must remove protocol AXVCLR EVENT from the SDAM Menu Protocol using the following example.

```
Select OPTION: 1  ENTER OR EDIT FILE ENTRIES

INPUT TO WHAT FILE: PROTOCOL//
EDIT WHICH FIELD: ALL//

Select PROTOCOL NAME: SDAM MENU        Appointment Management
NAME: SDAM MENU//
ITEM TEXT: Appointment Management  Replace
Select SYNONYM:
PRINT NAME:
DISABLE:
LOCK:
DESCRIPTION:
This menu contains all the activities for the appointment management option.

  Edit? NO//
PROHIBITED TIMES:
TYPE: menu//
FILE LINK:
COST:
Select ITEM: AXVCLR EVENT// @
    SURE YOU WANT TO DELETE THE ENTIRE ITEM? Y  (Yes)
```

2. All sites must add SDRR EVENT to the SDAM MENU protocol. This will need to be done after normal business hours.

```
Select OPTION: 1  ENTER OR EDIT FILE ENTRIES

INPUT TO WHAT FILE: PROTOCOL//
EDIT WHICH FIELD: ALL//
Select PROTOCOL NAME:    SDAM MENU     Appointment Management
NAME: SDAM MENU//
ITEM TEXT: Appointment Management  Replace
Select SYNONYM:
PRINT NAME:
DISABLE:
LOCK:
DESCRIPTION:
This menu contains all the activities for the appointment management
option.
  Edit? NO//
PROHIBITED TIMES:
TYPE: menu//
FILE LINK:
COST:
```

```
Select ITEM: SD WAIT LIST ENTRY// SDRR EVENT Recall Reminder Action
   MNEMONIC: RR   (PLEASE TYPE RR AS THE MNEMONIC)
   SEQUENCE:
   MODIFYING ACTION:
   FORMAT CODE:
   DISPLAY NAME: ^
```

3. Assign the SDRR MANAGER security key to your site's Recall Reminder Coordinators.

4. Printer Terminal setting if your site chooses to print Recall cards.

```
TERMINAL TYPE FILE ENTRY:
 NAME: P-REMOTECARD1 (TELNET)               SELECTABLE AT SIGN-ON: NO
  RIGHT MARGIN: 35                          FORM FEED: #
  PAGE LENGTH: 21                           BACK SPACE: $C(8)
  OPEN EXECUTE: W $C(27),"E",$C(27),"&l1o174A"
  CLOSE EXECUTE: D CLOSE^NVSPRTU
```

The postcards are 4X6, govt. FL22 preprinted with the return address. One side of the postcard has the return address of the VA. The patient address information will be printed on this side by using Recall Reminder print options. The other side has information the patient will need about calling in to schedule the appointment.

There should not be any sensitive patient information included on this card.

The wording on the back of the cards may be preprinted by an outside vendor or a site print shop. Below are examples of possible wording which may be changed at each facility if desired. When using the cards, the only items that will print on the front of the card is the patient's address information, FL (if there is a fasting lab), NFL (if there are non-fasting labs) and **## if the appointment is greater than 30 minutes.

The print options will only print the front part of the cards.

FRONT OF CARD

```
John Doe
1111 Street
Everywhere, OR 98321

**NFL
**60
```

Below are two examples taking into consideration patient privacy requirements. If a site chooses to print Recall Reminder Cards, they must have a source for printing the back of the cards.

Clinic names that reference medical specialties such as GU, Mental Health, Dermatology, etc. or diagnoses must not be included on a postcard.

BACK OF CARD

Example 1

```
Please call one of the following
numbers to arrange an appointment that will be
convenient for you during the next month.

Portland Dialing Area: 503-xxx-xxxx
Vancouver Dialing Area: 360-xxx-xxxx
All Other Toll Free 1-800-xxx-xxxx
```

Example 2

```
It's that time again!

Please call (xxx) xxx-xxxx
Or toll free 1-800-xxx-xxxx ext. xxxx
Any weekday (9:00am-3:00pm) to schedule an appointment.

Date/time_____Fasting: Yes    No

VA-Putting Veterans First
```

5. If your site has installed any version of Walla Walla's Recall application, please run the following options in order. If you are unsure if your site has any version of Walla Walla's Recall application, check to see if you have the OUTPATIENT CLINIC RECALL file (#687065) and KIDS install AXVCLR*1.0*01. A site must have both of these items to be able to run the conversion options. Please read the instructions below the Conversion Menu before proceeding with the conversion.

```
SDRR IRM MENU     Conversion Menu

   1          Convert OUTPATIENT CLINIC RECALL PARAM
   2          Convert OUTPATIENT CLINIC RECALL APPT TYPES
   3          Convert OUTPATIENT CLINIC RECALL TEAM
   4          Convert OUTPATIENT CLINIC RECALL PROVIDERS
   5          Convert OUTPATIENT CLINIC RECALL
```

Run item 1 (Convert OUTPATIENT CLINIC RECALL PARAM) – Only after receiving a VistA email relating to Step 1 should you continue with Step 2. Each step will generate a VistA e-mail. Do not continue to the next step until you have received the e-mail that shows the previous conversion has finished for each file. Please see the Recall Reminder Technical and Security Guide for additional information and e-mail samples.

NOTE: When the Convert OUTPATIENT CLINIC RECALL [SDRR CONV OUTPATIENT RECALL] option is run, if a site added local fields to file #687065 (OUTPATIENT CLINIC RECALL), they will not be converted to file #403.5 (RECALL REMINDERS). Also, entries in file #687065 which do not have an entry in Recall Date (field #5) will not be moved over to file #403.5.

6. Auto Print for Recall Reminder [SDRR TASK JOB] needs to be setup up as a scheduled task using Kernel option Schedule/Unschedule Options [XUTM SCHEDULE] if your facility has selected at least one Recall Reminder Parameter to send notification type of LETTERS. When scheduling this job there is NO need to enter DEVICE FOR QUEUED JOB OUTPUT. This is determined by the printer name entered when setting up Recall Teams. ONLY printers that print 12 pitch should be selected for printing letters.

Example

```
Select OPTION to schedule or reschedule: SDRR TASK JOB    Auto Print for
Recall Reminder
Are you adding 'SDRR TASK JOB' as a new OPTION SCHEDULING (the 232ND)?
No//Yes

                        Edit Option Schedule
    Option Name: SDRR TASK JOB
    Menu Text: Auto Print for Recall Reminder           TASK ID:
  _____

  QUEUED TO RUN AT WHAT TIME: OCT 23,2008@20:00

DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

     RESCHEDULING FREQUENCY: 1D

          TASK PARAMETERS:

          SPECIAL QUEUEING:
```

7. Auto Print for Recall Reminder Cards [SDRR TASK JOB CARD] needs to be setup up as a scheduled task using Kernel option Schedule/Unschedule Options [XUTM SCHEDULE] if your facility has selected at least one Recall Reminder Parameter to send notification type of CARDS.

Example

```
Select OPTION to schedule or reschedule: SDRR TASK JOB    Auto Print for
Recall Reminder
Are you adding 'SDRR TASK JOB' as a new OPTION SCHEDULING (the 232ND)?
No//Yes

                        Edit Option Schedule
   Option Name: SDRR TASK JOB CARD
   Menu Text: Auto Print for Recall Reminder Cards          TASK ID:
 _____

  QUEUED TO RUN AT WHAT TIME: OCT 23,2008@23:30

DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

     RESCHEDULING FREQUENCY: 1D

            TASK PARAMETERS:

            SPECIAL QUEUEING:
```

8. Clean Up Clinic Recall Entries [SDRR CLEAN-UP] needs to be setup up as a scheduled task using Kernel option Schedule/Unschedule Options [XUTM SCHEDULE]. It is suggested this job be queued to run after 10:00pm.

Example

```
Select OPTION to schedule or reschedule: SDRR CLEAN-UP      Clean Up Clinic
Recall Entries
  Are you adding 'SDRR CLEAN-UP' as a new OPTION SCHEDULING (the 231ST)?
No//Yes
   Option Name: SDRR CLEAN-UP
    Menu Text: Clean Up Clinic Recall Entries           TASK ID:
  _____

  QUEUED TO RUN AT WHAT TIME: OCT 7,2008@23:30

DEVICE FOR QUEUED JOB OUTPUT:

 QUEUED TO RUN ON VOLUME SET:

     RESCHEDULING FREQUENCY: 1D

            TASK PARAMETERS:

            SPECIAL QUEUEING:
************************************************************
```

9. The following options (if your site has them) should be placed Out Of Order with a statement of "Replaced with Class I". This should only be done once all conversions of the older Clinic Recall files have been successfully completed and your facility Recall Coordinator has given approval.

AXVC Options

Clinic Recall Menu Option **[AXVCLR CLINIC RECALL MENU]**
Print Clinic Recall Cards by Div **[AXVCLR RECALL PR CARD BY DIV]**
Print Clinic Recall Cards by Clinic **[AXVCLR RECALL PR CARD BY CLINIC]**
Print Clinic Recall Cards by Prov **[AXVCLR RECALL PRINT CARD]**
Print Clinic Recall Cards by Team **[AXVCLR RECALL PR CARD BY TM]**
Add/Edit Clinic Recall Patient **[AXVCLR RECALL CARD ADD]**
Edit/Add Clinic Recall Provider **[AXVCLR ADD RECALL PROVIDER]**
Edit/Add Recall Teams **[AXVCLR ADD RECALL TEAM]**
Inquire to Patient Recall **[AXVCLR RECALL CARD INQ]**
Recall List Print **[AXVCLR RECALL PRINT REPORT]**

A687 Options

Print Clinic Recall Cards by Prov **[A687 RECALL PRINT CARD]**
Add/Edit Clinic Recall Patient   **[A687 RECALL CARD ADD]**
Edit/Add Clinic Recall Provider **[A687 ADD RECALL PROVIDER]**
Inquire to Patient Recall **[A687 RECALL CARD INQ]**
Recall List Print **[A687 RECALL PRINT REPORT]**

You may have these two additional options which will need to be placed out of order.

Clinic Recall Menu **[A687 CLINIC RECALL MENU]**
Print 2 Sided Clinic Recall Cards **[A687 RECALL PRINT CARD2]**

Example

```
Select OPTION: ENTER OR EDIT FILE ENTRIES


INPUT TO WHAT FILE: OPTION//
EDIT WHICH FIELD: ALL// OUT OF ORDER MESSAGE
THEN EDIT FIELD:


Select OPTION NAME: AXVCLR CLINIC RECALL MENU      Recall Clinic Menu
OUT OF ORDER MESSAGE: Replaced with Class I
```