

# **Incident Reporting (IR) V.2.0 Installation Guide**

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## Introduction

Version 2.0 of Incident Reporting has a totally new menu structure, different file numbers, and a different global. The files are now located in global ^QA and the routines, options, and templates have the QAN namespace. This package was developed under FileMan Version18, Kernel Version 6.5, and requires the NEW PERSON file (#200).

It is also suggested that sites perform system checks to determine what other routines may be targets for mapping. The global ^QA should be journaled and backed up. The QUALITY ASSURANCE SITE PARAMETERS file is introduced.

## Security

All data dictionary, delete, and audit access is protected with the file access code "@". It is the expectation that very rarely will direct use of FileMan be used to alter files since security at the FileMan level is much less strict.

## Options

As noted above, only the options listed are designed for direct assignment to users. While assignment of other options is technically possible, such assignments are not needed and would violate program office policy.

## Routine Mapping, Journal Procedures

Routine mapping is not anticipated for the Incident Reporting package. The journal procedure is recommended for all Quality Assurance globals. To initiate the procedure, you must run the Global Management utility (^%GLOMAN). There are various journal utilities which can now be run individually.

## Special Installation Instructions for IR V. 2.0 Test Sites

Version 2.0 of Incident Reporting uses the new numbering scheme, e.g., 2.0T12. Kernel version 6.5 does not as of yet fully support this new format for version numbers. Due to this, the main installation routine (QANINST) cannot fully determine what version of the QA integration Module is currently installed on your system. In order to install the latest test release of the QA Integration Module and Incident Reporting you should enter the following line: **K ^DD(740,0,"VR") D ^QANINST**. The kill will cause the installation routine to prompt you to update the QA Integration Module. This will also set up the QM Managers Menus. The KILL is only necessary if you are installing one test version of Incident Reporting or a subsequent version one on top of the other. The KILL is only needed at test sites. The national release of Incident Reporting will reset the ^DD(740,0,"VR") node to its correct value (1.4). A partial definition of file 513.72 will be carried along to ensure that the conversion of Version 1.0 Incident Reporting data to Version 2.0 Incident Reporting data is accurate and complete. It is important to have all Kernel variables defined. This can be accomplished by doing the following, **D ^XUP**. To convert old Incident Reporting data, **D ^QANCNV0**. A routine exists which changes the format of the set of codes for the field Severity Level. Run this routine after the conversion. The routine is **^QANSLEV**. It is strongly suggested that the QAN SITE PARAMETERS ENTER/EDIT be the first option executed. This option controls the functionality of the entire package.

# Installation

This system requires FileMan 18 or later, MAS 5.1 or later, and the NEW PERSON file (200). If you do install the software in a live account, please ensure that all Incident Reporting end users are off the system. It is recommended that the initialization be done at a time of low activity.

1. Load the QAI\*, QAQ\* and QAN\* routines into the account where the ^QA global resides, or where you want it to reside. If the ^QA global does not exist, please place it by using the GLOMAN utility.
2. Initialize the package by running the following inits. It is imperative that the inits be run in the order shown. Be sure to kill **^DD(740,0,"VR")** before running **^QANINST**.

## **D ^QANINST**

This is the Quality Assurance integration module. It sets up two shared Quality Assurance System files. See the Init Example.

- Pre-initialization routine will run which checks for typographical errors in the QA INCIDENTS file (#742.1). This operation will correct any errors that occur.
- The regular FileMan initialization will now begin for the QANINITS. Answer YES to change any file names that are different; NO to write over security codes; and YES to overwrite templates and options. This routine will define the version of the Quality Assurance integration module (QAQ) used for Incident Reporting. If this is the first time a Quality Assurance integration module has been installed on your system, input of your institution name/number is required. If this is not the first time for a Quality Assurance integration module install, the current (QAQ) instillation module will be updated to the version of the incoming (QAQ) instillation module. The QANINITS will now run.

- A post-initialization routine will run which checks for duplicates in files; QA INCIDENT file (#742.1), QA COMPLICATIONS LEADING TO DEATH file (#742.14), QA INCIDENT LOCATION file (#742.5). A check is also performed on the QA MEDICATION ERRORS file (#742.13). The purpose is to check for bad data and allow the person installing the package the option of changing pointers as well as deleting the bad entries. Several routines may be run at this point. If you had run a conversion routine to convert Version 1.0 data into Version 2.0, and used a large amount of memory, you can run the routine EN3^QANSLEV. This will delete all converted data. At this point you may rerun the conversion routine to properly convert data. A new conversion routine converts the old Severity Level data to the new format for Severity Level data. This can be invoked by running EN1^QANSLEV. Make sure your system has the NATIONAL SERVICE file (#730). To add "Extended Care" to the NATIONAL SERVICE file run the routine QANPST2.
- Using the TaskManager option, Schedule/Unschedule Options, please queue the QAN AUTO E-MAIL options, "QAN AUTO E-MAIL BRIEF", "QAN AUTO E-MAIL FULL", and "QAN AUTO E-MAIL DELETE". Queue these options to run at a time of low system activity every day (Choose 1D instead of 24 H). The AUTO E-MAIL options need server and domain information. This information is set up in the QAN SITE PARAMETERS ENTER/EDIT option. The server name for these options is S.A4BVNQADBSERVER and the domain is ISC-CHICAGO.VA.GOV. At this time it is not required to queue the option "QAN EARLY WARNING SYSTEM AUTO". This will be queued to run at a later date.
- With the assistance of the Package Coordinator, assign the menus to the users. Ascertain that the users have their terminals and printers in place and functional. Due to the importance of the QAN SITE PARAMETERS ENTER/EDIT option, it is recommended that manager type options reside under the manager's menu. User options should reside under the user's menu. The user's menu checks for the existence of Site Parameter data. If it does not exist, the user will not be allowed to access any appropriate options.

# Init Example

>D ^QANINST

Beginning installation of Incident Reporting Version 2.0T13.

You are running Version <NONE> of the QA Integration Module.

I have to update the QA Integration Module to version 1.4

This version (#1.4) of 'QAQINIT' was created on 02-APR-1992  
(at CHICAGO ISC, by VA FileMan V.18)

I HAVE TO RUN A PRE-INITIALIZATION ROUTINE.

I AM GOING TO SET UP THE FOLLOWING FILES:

740           QUALITY ASSURANCE SITE PARAMETERS

Note: You already have the 'QUALITY ASSURANCE SITE PARAMETERS' File.

740.1        AD HOC MACRO

Note: You already have the 'AD HOC MACRO' File.

740.5        QA AUDIT

Note: You already have the 'QA AUDIT' File.

SHALL I WRITE OVER FILE SECURITY CODES? NO//   (NO)

NOTE: This package also contains SORT TEMPLATES

SHALL I WRITE OVER EXISTING SORT TEMPLATES OF THE SAME NAME? YES//  
(YES)

NOTE: This package also contains INPUT TEMPLATES

SHALL I WRITE OVER EXISTING INPUT TEMPLATES OF THE SAME NAME?  
YES//(YES)

NOTE: This package also contains PRINT TEMPLATES

SHALL I WRITE OVER EXISTING PRINT TEMPLATES OF THE SAME NAME?  
YES// (YES)

NOTE: This package also contains OPTIONS

SHALL I WRITE OVER EXISTING OPTIONS OF THE SAME NAME? YES//(YES)

ARE YOU SURE EVERYTHING'S OK? Y   (YES)

Install/Clean-up QM Integration Module routines.

Loading QAIADLAU	Replacing QAQADLAU	Deleting QAIADLAU
Loading QAIAHOC0	Replacing QAQAHOC0	Deleting QAIAHOC0
Loading QAIAHOC1	Replacing QAQAHOC1	Deleting QAIAHOC1
Loading QAIAHOC2	Replacing QAQAHOC2	Deleting QAIAHOC2
Loading QAIAHOC3	Replacing QAQAHOC3	Deleting QAIAHOC3
Loading QAIAHOC4	Replacing QAQAHOC4	Deleting QAIAHOC4
Loading QAIAHOCY	Replacing QAQAHOCY	Deleting QAIAHOCY
Loading QAIAHOCZ	Replacing QAQAHOCZ	Deleting QAIAHOCZ
Loading QAIAPGRP	Replacing QAQAPGRP	Deleting QAIAPGRP
Loading QAIAUDIT	Replacing QAQAUDIT	Deleting QAIAUDIT
Loading QAIAUTL	Replacing QAQAUTL	Deleting QAIAUTL
Loading QAIAXREF	Replacing QAQAXREF	Deleting QAIAXREF
Loading QAIDATE	Replacing QAQDATE	Deleting QAIDATE
Loading QAINTEG	Replacing QAQNTEG	Deleting QAINTEG
Loading QAIPKGV	Replacing QAQPKGV	Deleting QAIPKGV

Loading QAISELCT            Replacing QAQSELCT            Deleting QAISELCT  
Loading QAISITE            Replacing QAQSITE            Deleting QAISITE

...SORRY, THIS MAY TAKE A FEW MOMENTS.....  
'QAQ MANAGER' Option Filed  
'QAQ PACKAGES INQUIRE' Option Filed  
'QAQ SITE PARAMETERS' Option Filed  
'QAQ USER' Option Filed.....  
OK, I'M DONE.  
NO SECURITY-CODE PROTECTION HAS BEEN MADE

You are running Version 1.4 of the QA Integration Module.  
Now installing Incident Reporting Version 2.0T13.

This version (#2) of 'QANINIT' was created on 29-APR-1992  
(at QUALITY, by VA FileMan V.18)

I HAVE TO RUN A PRE-INITIALIZATION ROUTINE.  
I AM GOING TO SET UP THE FOLLOWING FILES:

513.72        \*PATIENT QA EVENT  
Note: You already have the '\*PATIENT QA EVENT' File.

513.941      \*INCIDENT TYPE  
Note: You already have the '\*INCIDENT TYPE' File.

742            QA PATIENT INCIDENT REVIEW  
Note: You already have the 'QA PATIENT INCIDENT REVIEW' File.

742.1        QA INCIDENTS (including data)  
Note: You already have the 'QA INCIDENTS' File.  
Want my data to overwrite yours? YES

742.13      QA MEDICATION ERRORS (including data)  
Note: You already have the 'QA MEDICATION ERRORS' File.  
Want my data to overwrite yours? YES

742.14      QA COMPLICATIONS LEADING TO DEATH (including data)  
Note: You already have the 'QA COMPLICATIONS LEADING TO DEATH' File.  
Want my data to overwrite yours? YES

742.4        QA INCIDENT REPORT

742.5        QA INCIDENT LOCATION (including data)  
Want my data to overwrite yours? YES

742.6        QA INCIDENT SUMMARY  
Note: You already have the 'QA INCIDENT SUMMARY' File.

SHALL I WRITE OVER FILE SECURITY CODES? NO//        (NO)  
NOTE: This package also contains OPTIONS  
      SHALL I WRITE OVER EXISTING OPTIONS OF THE SAME NAME? YES//  
(YES)

ARE YOU SURE EVERYTHING'S OK? Y    (YES)

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

'QAN ADHOC REPORT' Option Filed  
'QAN AUTO E-MAIL BRIEF' Option Filed  
'QAN AUTO E-MAIL DELETE' Option Filed  
'QAN AUTO E-MAIL FULL' Option Filed  
'QAN DBASE INTEGRITY CHECKER' Option Filed  
'QAN EARLY WARNING SYSTEM AUTO' Option Filed  
'QAN EARLY WARNING SYSTEM MAN' Option Filed  
'QAN INCIDENT BENEFICIARY RPT' Option Filed  
'QAN INCIDENT FOLLOW-UP' Option Filed  
'QAN INCIDENT LOCATION' Option Filed  
'QAN INCIDENT MAIL TO REGION' Option Filed  
'QAN INCIDENT MAIN MENU' Option Filed  
'QAN INCIDENT QUICK' Option Filed  
'QAN INCIDENT REGION STATUS' Option Filed  
'QAN INCIDENT REPORT' Option Filed  
'QAN INCIDENT REPORTS' Option Filed  
'QAN INCIDENT STATUS ENTER/EDIT' Option Filed  
'QAN INCIDENT SUMMARY REGION' Option Filed  
'QAN INCIDENT SUMMARY SITE' Option Filed  
'QAN INCIDENT WORKSHEET' Option Filed  
'QAN INCIDENT/WARD REPORT ' Option Filed  
'QAN MANAGER MENU' Option Filed  
'QAN OUTPATIENT INCIDENTS' Option Filed  
'QAN PATIENT MANIPULATION' Option Filed  
'QAN PATIENT/INCIDENT VIEW' Option Filed  
'QAN RECORD MANIPULATION' Option Filed  
'QAN SITE PARAMETERS ENTER/EDIT' Option Filed  
NO SECURITY-CODE PROTECTION HAS BEEN MADE

The following is an example of the post-init ^QANPST0. It's possible that duplicates may or may not be found at sites. This will also check for duplicates in the QA MEDICATION ERRORS file. The old Medication Error Type was in a free text format. The new format is a set of codes. The post init will bring up the old free text format and allow you to repoint to the new entry with the set of codes as a format.

Checking for duplicates in file: 742.1 -> QA INCIDENTS

Checking for duplicates in file: 742.14 -> QA COMPLICATIONS LEADING TO DEATH

Checking for duplicates in file: 742.5 -> QA INCIDENT LOCATION

Duplicate SUICIDE entry in file: QA INCIDENTS (742.1)

Enter the proper internal entry number for: SUICIDE

1) IEN->1

2) IEN->209

Choose 1 - 2: 1

Duplicate OPERATING ROOM entry in file: QA COMPLICATIONS LEADING TO DEATH (742.14)

Enter the proper internal entry number for: OPERATING ROOM

1) IEN->1

2) IEN->9

Choose 1 - 2: 1

...HMMM, LET ME PUT YOU ON 'HOLD FOR A SECOND.....  
.....

Checking for old data in file: 742.13 -> QA MEDICATION ERRORS

Duplicates not found for the QA medication Errors file.

Checking for old data in file: 742.13 -> QA MEDICATION ERRORS

Current Medication Error: INCORRECT DOSAGE

Current Medication Error Type: PROCEDURAL/TRANSCRIPTION

Select QA Medication Error: ?  
 ANSWER WITH QA MEDICATION ERRORS NUMBER  
 DO YOU WANT THE ENTIRE QA MEDICATION ERRORS LIST? Y (YES)  
 CHOOSE FROM:

- 1 FAILURE TO NOTE START/STOP DATE P
  - 2 NO ORDER P
  - 3 OMISSION P
  - 4 FAILURE TO TRANSCRIBE ORDER(S) T
  - 5 INCORRECT RATE T
  - 6 INCORRECT START/STOP DATE(S) T
  - 7 FAILURE TO NOTE ALLERGY P
  - 8 FAILURE TO NOTE ALLERGY T
  - 9 INCORRECT DOSAGE P
  - 10 INCORRECT DOSAGE T
  - 11 INCORRECT MEDICATION P
  - 12 INCORRECT MEDICATION T
  - 13 INCORRECT PATIENT P
  - 14 INCORRECT PATIENT T
  - 15 INCORRECT ROUTE P
  - 16 INCORRECT ROUTE T
  - 17 INCORRECT TIME P
  - 18 INCORRECT TIME T
  - 19 DISPENSED INCORRECT DOSE O
  - 20 DISPENSED INCORRECT LABELS O
  - 21 DISPENSED INCORRECT MEDICATION O
- '^' TO STOP: ^

Select QA Medication Error: `1 FAILURE TO NOTE START/STOP DATE P

Do you wish to delete Medication Error: INCORRECT DOSAGE  
 Medication Error Type: PROCEDURAL/TRANSCRIPTION? NO// Y (YES)

Checking for duplicates in file: 742.1 -> QA INCIDENTS

Checking for duplicates in file: 742.14 -> QA COMPLICATIONS LEADING TO DEATH

Checking for duplicates in file: 742.5 -> QA INCIDENT LOCATION

No duplicates were found.

Checking for old data in file: 742.13 -> QA MEDICATION ERRORS

Duplicates not found for the QA medication Errors file.

Re-indexing the QA Medication Errors file.  
 This may take a while.....

Ok, I am Done!

Creating the QM User and Manager Menus.....

Installation of Incident Reporting Version 2.0T13 complete!