

Patient Representative V. 2.0 Technical Manual

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Introduction

The Patient Representative package is compatible with Kernel V. 7.1 and VA FileMan V. 20 or later versions. It uses the QA namespace in file number range 745 - 745.6.

A focus of the Patient Representative Program, which can be accomplished through this software package, is to ensure the medical center responds to patient needs. This package offers the opportunity to track and trend compliments and complaints and to measure a medical center's types of complaints as they relate to the Customer Service Standards, the Quality Matrix, and the National Patient Satisfaction Survey.

Overview

This software package was developed to support the Patient Representative with the collection and categorization of complaints and compliments. The issue codes provide the opportunity to track types of complaints and provide trends of specific complaints. The software package provides the opportunity to measure the veteran's complaints and perceptions of a medical center related to those two areas.

Functional Description

The Patient Representative software package is designed to support the following actions.

- Entering and editing contact information
- Sending Reports of Contact via the Alert system
- Tracking contacts that have responses due
- Printing various lists, statistical, and ad hoc reports

Package-wide Variables

There are no package-wide variables used.

Implementation and Maintenance

Once the software is installed, users with the QAC SETUP MENU have all the options necessary to set-up and maintain the files. However, they may need guidance in deciding the best method for archiving and how often to purge records.

Set-up and Maintenance Menu (QAC SETUP MENU)

Add New Service/Discipline (QAC NEW SERV)

This option allows the Patient Advocate to add new entries into the SERVICE/DISCIPLINE file (#745.55).

Archive Report (QAC ARCHIVE)

This option prints brief data on each record within the selected date range. The data can be saved to a file, captured to a word processing package to save on a floppy, or sent to a printer for a hard copy. This option does not purge records from the database.

Congressional Contact Enter/Edit (QAC CONGRESSIONAL)

This option is used to enter congressional contacts if the site wants to track contact data for specific congressional contacts.

Issue Code Enter/Edit (QAC CODE)

Issue codes can no longer be entered or edited. Only national issue codes are valid. The Issue Codes List will periodically be evaluated and updated.

Patient Representative Keys (QAC KEY)

This option allocates or deallocates the Patient Rep Info Taker Key (QAC CONTACT). This is used for authorizing people to take down the information about the contact. It also allocates or deallocates the Patient Rep Record Control (QAC EDIT) key. It allows the holder to edit any contact record.

Purge Contact Records (QAC PURGE)

This option allows you to purge (delete) a range of records from the database.

Site Parameters Edit (QAC PARAMETERS EDIT)

There are two site parameters. One provides a listing of previously entered issue codes with each service/section when editing a record; the other turns on the automatic Report of Contact Alert system.

Routines

Routine List

The following are the steps you may take to obtain a listing of the routines contained in the Patient Representative package.

1. Programmer Options Menu
2. Routine Tools Menu
3. First Line Routine Print Option
4. Routine Selector: QAC*

Callable Routines

There are no routines that are called by other packages.

Files

File List

| <u>FILE NUMBER</u> | <u>FILE NAME</u> | <u>GLOBAL</u> |
|------------------------|----------------------------|---------------|
| 745.1 | CONSUMER CONTACT | QA(745.1, |
| 745.2 | CONTACT ISSUE CODE | QA(745.2, |
| *745.3 | QUALITY MATRIX | QA(745.3, |
| 745.4 | CONGRESSIONAL OFFICE | QA(745.4, |
| 745.5 | CONTACT DISCIPLINES | QA(745.5, |
| 745.55 | QAC SERVICE/DISCIPLINE | QA(745.55, |
| 745.6 | CUSTOMER SERVICE STANDARDS | QA(745.6, |

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The following are the steps you may take to obtain information concerning the files and templates contained in the Patient Representative package.

File Flow (Relationships between files)

1. VA FileMan Menu
2. Data Dictionary Utilities Menu
3. List File Attributes Option
4. Enter File # or range of File #s
5. Select Listing Format: Standard
6. You will see what files point to the selected file. To see what files the selected file points to, look for fields that say "POINTER TO".

Templates

1. VA FileMan Menu
2. Print File Entries Option
3. Output from what File: Print Template
Sort Template
Input Template
List Template
4. Sort by: Name
5. Start with name: QAC to QACZ
6. Within name, sort by: <RET>
7. First print field: Name

Exported Options

The following are the steps you may take to obtain information about menus and exported options concerning the Patient Representative package.

Menu Diagrams

1. Programmers Options
2. Menu Management Menu
3. Display Menus and Options Menu
4. Diagram Menus
5. Select User or Option Name: QAC Main Menu

Exported Options

1. VA FileMan Menu
2. Print File Entries Option
3. Output from what File: OPTION
4. Sort by: Name
5. Start with name: QAC to QACZ
6. Within name, sort by: <RET>
7. First print field: Name

Archiving and Purging

Archiving

The Archive Report option in the Set-up and Maintenance Menu can be used to archive records over a selected date range. It provides the mechanism to save certain aspects of the records to a file or hard copy report.

Purging

The Purge Contact Records option in the Set-up and Maintenance Menu can be used to purge records over a selected date range. The Archive Report does not purge records. It provides the mechanism to save certain aspects of the records to a file or hard copy report. The purge option removes records from the system.

External/Internal Relations

External Relations

- This package has a controlled substance integration agreement, DBIA226-C, with the PIMS package to print the rated disabilities for a patient in the Enter New Contact and Edit Contact Record options.
- Data from each local database is sent in a daily MailMan message to the Austin Automation Center. This is a tasked job (START^QACMAIL0) that is scheduled to run at 1:30am Tuesday - Saturday. It sends those Reports of Contact from the Consumer Contact file (#745.1) which were entered/edited the day before. A manual option, QAC ROLLUP (MANUAL), can be used to retransmit up to one month's reports if needed.
- Other files used by this package are as follows.

| FILE # | FILE NAME | USAGE |
|--------|-------------------------|--|
| 2 | Patient | Used to extract patient data such as name, SSN, DOB, etc. |
| 4 | Institution | Used to extract the division for the ROC. |
| 8 | Eligibility Code | Uses the supported VADPT routine to capture the patient's eligibility. |
| 19.1 | Security Key | Used to look up holders of the QAC CONTACT and QAC EDIT keys. |
| 40.8 | Medical Center Location | Used by the Input Transform for the Division field in file 745.1. |
| 44 | Hospital Location | Used by the Location of Event field to designate where the patient resided at the time of the issue. |
| 200 | New Person | Used to extract name for inclusion in File# 745.1. |
| 408.32 | Means Test Status | Uses the supported VADPT routine to capture the patient's means test current status. |
| 730 | National Service | Following conversion of the data in the Services Involved field to the Serv/Sect Involved field using File#49, File# 730 will no longer be used. |

Internal Relations

The options in the package may be invoked independently and tailored to the user's needs.

How to Generate On-line Documentation

This section describes some of the various methods by which users may secure Patient Representative (PR) technical documentation. On-line technical documentation pertaining to the PR software, in addition to that which is located in the help prompts and on the help screens which are found throughout the PR package, may be generated through utilization of several KERNEL options. These include but are not limited to: XINDEX, Menu Management Inquire Option File, Print Option File, and FileMan List File Attributes.

Entering question marks at the "Select ... Option:" prompt may also provide users with valuable technical information. For example, a single question mark (?) lists all options which can be accessed from the current option. Entering two question marks (??) lists all options accessible from the current one, showing the formal name and lock for each. Three question marks (???) displays a brief description for each option in a menu while an option name preceded by a question mark (?OPTION) shows extended help, if available, for that option.

For a more exhaustive option listing and further information about other utilities which supply on-line technical information, please consult the **VISTA** Kernel Reference Manual.

XIndex

This option analyzes the structure of a routine(s) to determine in part if the routine(s) adheres to **VISTA** Programming Standards. The XINDEX output may include the following components: compiled list of errors and warnings, routine listing, local variables, global variables, naked globals, label references, and external references. By running XINDEX for a specified set of routines, the user is afforded the opportunity to discover any deviations from **VISTA** Programming Standards which exist in the selected routine(s) and to see how routines interact with one another, that is, which routines call or are called by other routines.

To run XINDEX for the PR package, specify the following namespace at the "routine(s) ?>" prompt: QAC*.

PR initialization routines which reside in the UCI in which XINDEX is being run, compiled template routines, and local routines found within the PR namespace should be omitted at the "routine(s) ?>" prompt. To omit routines from selection, preface the namespace with a minus sign (-).

Inquire to Options File

This Menu Manager option provides the following information about a specified option(s): option name, menu text, option description, type of option, and lock (if any). In addition, all items on the menu are listed for each menu option.

To secure information about PR options, the user must specify the name or namespace of the option(s) desired. QAC is the namespace associated with the PR package.

Print Options File

This utility generates a listing of options from the OPTION file. The user may choose to print all of the entries in this file or may elect to specify a single option or range of options. To obtain a list of PR options, the following option namespace should be specified: QAC.

List File Attributes

This FileMan option allows the user to generate documentation pertaining to files and file structure. Utilization of this option via the "Standard" format will yield the following data dictionary information for a specified file(s): file name and description, identifiers, cross-references, files pointed to by the file specified, files which point to the file specified, input templates, print templates, and sort templates. In addition, the following applicable data is supplied for each field in the file: field name, number, title, global location, description, help prompt, cross-reference(s), input transform, date last edited, and notes.

Using the "Global Map" format of this option generates an output which lists all cross-references for the file selected, global location of each field in the file, input templates, print templates, and sort templates.

Security

General Security

Security is maintained through menu distribution and assignment. Only Patient Representatives and their designees should receive access to the software. Standard VA FileMan access has been applied to the files. VA FileMan access should be limited to those persons with “need to know” status.

Security Keys

The following are the steps you may take to obtain information about the security keys contained in the Patient Representative package.

1. VA FileMan Menu
2. Print File Entries Option
3. Output from what File: SECURITY KEY
4. Sort by: Name
5. Start with name: QAC to QACZ
6. Within name, sort by: <RET>
7. First print field: Name
8. Then print field: Description

FileMan Access Codes

Below is a list of recommended VA FileMan access codes associated with each file contained in the PR package. This list may be used to assist in assigning users appropriate VA FileMan access codes.

| <u>FILE NUMBER</u> | <u>FILE NAME</u> | <u>DD ACCESS</u> | <u>RD ACCESS</u> | <u>WR ACCESS</u> | <u>DEL ACCESS</u> | <u>LAYGO ACCESS</u> | <u>AUDIT ACCESS</u> |
|--------------------|----------------------------|------------------|------------------|------------------|-------------------|---------------------|---------------------|
| 745.1 | CONSUMER CONTACT | @ | | | @ | | |
| 745.2 | CONTACT ISSUE CODE | @ | | @ | @ | | |
| *745.3 | QUALITY MATRIX | @ | | @ | @ | @ | @ |
| 745.4 | CONGRESSIONAL OFFICE | @ | | | @ | | |
| 745.5 | CONTACT DISCIPLINES | @ | | @ | @ | @ | |
| 745.55 | QAC SERVICE/DISCIPLINE | @ | | | @ | | |
| 745.6 | CUSTOMER SERVICE STANDARDS | @ | | @ | @ | @ | |

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Glossary

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|--------------------------------------|--|
| Ad Hoc | A reporting mechanism that allows the user to determine, from a predefined list of fields, what fields the program should sort by and what data to print. |
| Alert | In the Patient Representative package, the alert contains the information in the Report of Contact. |
| Category | Category of Beneficiary as defined by the Patient Treatment File. Classification system for types of benefits. |
| Consumer Contact Number | A number designating a specific contact. The number consists of <i>site#</i> , <i>year</i> , and <i>case#</i> . Example: 500.980017 500 = Hines CIOFO 98 = 1998 0017 = Case number |
| Contact | The person or organization that is getting in touch with the Patient Representative. |
| Eligibility | Classification system for entitlement. |
| Issue Code | Brief reason for the contact with the Patient Representative. |
| Macro | A series of commands that can be called up by one simple command. Used in the Ad Hoc Report option. |
| Patient Representative | An advocate or agent for the patient. |
| Patient (Contact) Representative Key | This key defines the look-up list for the "Information Taken By" field. |

| | |
|--------------------------------|---|
| Patient Rep Record Control Key | The authority allocated or given to Patient Representatives to be able to look at or edit any Patient Contact Record. |
| Report of Contact (ROC) | A printout of information concerning an issue. |
| Resolution Text | A word processing area in which information is entered on how an issue was managed. |
| Source of Contact | How contact with the Patient Representative was made. |
| Treatment Status | Where patient was at time of issue; inpatient, outpatient, etc.. |