



**Update\_2\_0\_149**

## **Clinical Reminders**

# **VA-CSP Caregiver Templates Install Guide**

**August 2020**

Product Development  
Office of Information Technology  
Department of Veterans Affairs

## **Table of Contents**

<b>INTRODUCTION .....</b>	<b>1</b>
<b>PRE-INSTALL .....</b>	<b>4</b>
<b>INSTALL DETAILS .....</b>	<b>4</b>
<b>INSTALL EXAMPLE.....</b>	<b>5</b>
<b>POST INSTALLATION .....</b>	<b>9</b>

# Introduction

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DESCRIPTION: This update includes two dialogs for the Caregiver Support Program (CSP):

## **CSP PRIMARY CARE COLLABORATION NOTE:**

Under the MISSION Act requirements, the Program of Comprehensive Assistance for Family Caregivers (PCAFC) is expanded to serve Veterans of all eras through a 2-phase approach. Regulations require that Caregiver Support Program (CSP) staff collaborate with the Veteran's primary care team to the extent practical/possible when determining eligibility for the PCAFC. Primary Care Team is defined as one or more individuals who provide care for the Veteran. The CSP staff is seeking feedback and/or sharing documentation such as comprehensive assessments or progress notes that discuss ADL needs and/or supervision, protection or instruction needs; or a treatment plan. Primary care team members are not responsible for determining eligibility for the PCAFC. This template provides a standardized way to collect and document the collaboration between the CSP and the primary care team.

## **CSP CAREGIVER ASSESSMENT:**

Under the MISSION Act requirements, the Program of Comprehensive Assistance for Family Caregivers (PCAFC) is expanded to serve Veterans of all eras through a 2-phase approach. Regulations require that Caregiver Support Program (CSP) staff assess and evaluate the Family Caregiver applicant that is applying for the PCAFC. The assessment template is designed to collect and record pertinent information from the caregiver in a standardized format. Information collected is utilized by the VISN Centralized Eligibility and Appeals Team when rendering eligibility determinations.

UPDATE\_2\_0\_149 contains 1 Reminder Exchange entry:

## **UPDATE\_2\_0\_149 VA-CSP CAREGIVER TEMPLATES**

**The exchange file contains the following components:**

### **TIU TEMPLATE FIELD**

DATE  
WORD 2 LINES  
WORD 2 LINES1 REQ  
WORD 1 LINE1 PC  
TEXT (1-70) REQUIRED  
TEXT (1-60 CHAR)R  
VA-CSP WP 4 LINES R  
VA\*CG BLANK SPACE2  
VA-CSP WP 2 LINES  
VA\*CG ROLE AFFECT  
VA\*CG ROUTINE  
VA\*CG WP FOUR LINES R  
TEXT NO LIMIT  
VA-WORD  
OTHER NON-VA

OTHER TEXT  
DATE (\*)

## HEALTH FACTORS

VA-REMINDER UPDATES  
VA-UPDATE\_2\_0\_149  
CGAS PCG INFORMATION  
CGAS PINS NONE  
CGAS PINS PRVTE  
CGAS PINS CHPVA  
CGAS PINS TCARE  
CGAS PINS MCAID  
CGAS PINS MCARE  
CGAS PRELATION OTHER  
CGAS PRELATION SIG  
CGAS PRELATION OTREL  
CGAS PRELATION SIS  
CGAS PRELATION BRO  
CGAS PRELATION FA  
CGAS PRELATION MO  
CGAS PRELATION DAU  
CGAS PRELATION SON  
CGAS PRELATION SP  
CGAS PCG FAM MBR YES  
CGAS PCG FAM MBR NO  
CGAS PCG 18+YR OLD NO  
CGAS PCG 18+YR OLD YES  
CGAS PCG ASSESSMENT  
CGAS SAFE IN HOME NO  
CGAS SAFE IN HOME YES  
CGAS PFINANCE NONE  
CGAS PFINANCE INS REVIEW ED  
CGAS PFINANCE RETIRE PLAN  
CGAS PFINANCE DEBT MGMT  
CGAS PFINANCE BUDGET  
CGAS PFINANCE NO  
CGAS PFINANCE YES  
CGAS PLEGAL NONE  
CGAS PLEGAL REF ATTN  
CGAS PLEGAL REF COMM RESRCE  
CGAS PLEGAL ED OPP  
CGAS PLEGAL GUARDIANSHIP  
CGAS PLEGAL WILL  
CGAS PLEGAL POA  
CGAS PLEGAL ADV DIR  
CGAS PADVERSE NO  
CGAS PCONCERN HEALTH NO

CGAS PCONCERN HEALTH YES  
CGAS PLEGAL NO  
CGAS PLEGAL YES  
CGAS PSAFE NO  
CGAS PSAFE YES  
CGAS PCHANGE HEALTH NO  
CGAS PCHANGE HEALTH YES  
CGAS PPROV ASSIST NONE  
CGAS PPROV ASSIST OTHER  
CGAS PPROV ASSIST RESPITE  
CGAS PPROV ASSIST AD EQUIP  
CGAS PPROV ASSIST ADHC  
CGAS PPROV ASSIST HHC AGENCY  
CGAS PCG HISTORY  
CGAS PASSIST NO  
CGAS PASSIST YES  
CGAS PSERVICES NO  
CGAS PSERVICES OTHER  
CGAS PSERVICES MILTRY  
CGAS PSERVICES COMM  
CGAS PSERVICES VA  
CGAS PSERVICES YES  
CGAS PSTRATEGY NO  
CGAS PSTRATEGY YES  
CGAS PTIME MORE FIVE  
CGAS PTIME THREE-FIVE  
CGAS PTIME ONE-THREE  
CGAS PTIME LESS ONE  
CGAS PTIME NONE  
CGAS PTRAIN NO  
CGAS PTRAIN YES  
CGAS PCGEXP NO  
CGAS PCGEXP YES  
CGAS PCG RESPONSIBILITIES  
CGAS PVOLUNTEER NO  
CGAS PVOLUNTEER YES  
CGAS PCGOTHERS NA  
CGAS PCGOTHERS OTHER  
CGAS PCGOTHERS PAR  
CGAS PCGOTHERS GRCHILD  
CGAS PCGOTHERS CHILD  
CGAS PSCH NA  
CGAS PSCH ENRPEND  
CGAS PSCH FT  
CGAS PSCH PT  
CGAS PEMPL OTHER

CGAS PEMPL SEEK  
CGAS PEMPL FT  
CGAS PEMPL PT  
CGAS PMETHOD IN-HOME  
CGAS PMETHOD FACILITY  
CGAS PMETHOD THLTH  
CGAS PMETHOD TELEPHONE  
VA-CSP CAREGIVER INFO  
VA-CSP 2ND SECONDARY CAREGIVER/APPLICANT  
VA-CSP SECONDARY CAREGIVER/APPLICANT  
VA-CSP PRIMARY CAREGIVER/APPLICANT

### **REMINDER SPONSOR**

OFFICE OF MENTAL HEALTH SERVICES  
MENTAL HEALTH SERVICES

### **REMINDER TERM**

VA-REMINDER UPDATE\_2\_0\_149

### **REMINDER DIALOG**

VA-CSP CAREGIVER ASSESSMENT REV  
VA-CSP PRIMARY CARE COLLABORATION NOTE

### **TIU DOCUMENT DEFINITION**

PATIENT NAME  
PATIENT DATE OF BIRTH  
PATIENT SSN

## **Pre-Install**

---

In Vista, use the option reminder dialog manager, reminder dialogs and change your view to Element view. Locate and review the following reminder dialog elements used to document contact information for the Veteran when the visit is a tele video visit.

VAL-TH VVC TELEPHONE TRIAGE CONTACT PHONE OBJECT  
VAL-TH VVC TELEPHONE TRIAGE PATIENT LOCATION HOME

You will edit these elements post install and insert your local data objects into the dialog text.

## **Install Details**

---

This update is being distributed as a web host file. The address for the host file is:  
**[https://vaww.va.gov/reminders/docs/UPDATE\\_2\\_0\\_149.PRD](https://vaww.va.gov/reminders/docs/UPDATE_2_0_149.PRD)**.

The file will be installed using Reminder Exchange, programmer access is not required.

Installation:

=====  
This update can be loaded with users on the system. Installation will take less than 30 minutes.

## Install Example

To Load the Web Host File. Navigate to Reminder Exchange in Vista.

```
+      + Next Screen  - Prev Screen  ?? More Actions  >>>
CFE Create Exchange File Entry      LHF Load Host File
CHF Create Host File                 LMM Load MailMan Message
CMM Create MailMan Message           LR  List Reminder Definitions
DFE Delete Exchange File Entry       LWH Load Web Host File
IFE Install Exchange File Entry      RI  Reminder Definition Inquiry
IH  Installation History              RP  Repack
Select Action: Next Screen// LWH    Load Web Host File
Input the URL for the .prd file: https://vaww.va.gov/reminders/docs/UPDATE_2_0_149.PRD
```

At the **Select Action:** prompt, enter **LWH** for Load Web Host File

At the **Input the url for the .prd file:** prompt, type the following web address:

[https://vaww.va.gov/reminders/docs/UPDATE\\_2\\_0\\_149.PRD](https://vaww.va.gov/reminders/docs/UPDATE_2_0_149.PRD)

You should see a message at the top of your screen that the file successfully loaded.

```
https://vaww.va.gov/reminders/docs/UPDATE_2_0_149.PRD successfully loaded.
```

Search and locate an entry titled **UPDATE\_2\_0\_149 VA-CSP CAREGIVER TEMPLATES** in reminder exchange.

```
+Item  Entry                                     Source                                     Date Packed
187    UPDATE_2_0_149 VA-CSP CAREGIVER TEMPLATES  GRIFFITH@SALT LAKE CI  08/05/2020@06:18
188    UPDATE_2_0_15 VA-LIPID STATIN RX CVD/DM  GRIFFITH@SALT LAKE CI  02/01/2019@07:19
189    UPDATE_2_0_150 VA-CSP VETERAN FUNCTIONAL ASSESSMENT INSTRUMENT  GRIFFITH@SALT LAKE CI  07/24/2020@10:06
190    UPDATE_2_0_151 VA-PCADC CLINICAL INTERVIEW TEMPLATE  GRIFFITH@SALT LAKE CI  07/24/2020@08:35
191    UPDATE_2_0_152 PCAFC INTAKE                GRIFFITH@SALT LAKE CI  07/24/2020@06:02
+      + Next Screen  - Prev Screen  ?? More Actions  >>>
CFE Create Exchange File Entry      LHF Load Host File
CHF Create Host File                 LMM Load MailMan Message
CMM Create MailMan Message           LR  List Reminder Definitions
DFE Delete Exchange File Entry       LWH Load Web Host File
IFE Install Exchange File Entry      RI  Reminder Definition Inquiry
IH  Installation History              RP  Repack
Select Action: Next Screen// IFE    Install Exchange File Entry
Enter a list or range of numbers (1-441): 187
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry

Enter the number that corresponds with your entry **UPDATE\_2\_0\_149 VA-CSP CAREGIVER TEMPLATES** (in this example it is entry 187, it will vary by site). The date of the exchange file should be 08/05/2020.

```

Component                                     Category      Exists
Source:      GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 08/05/2020@06:18:02
Package Version: 2.0P46

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-CSP CAREGIVER ASSESSMENT REV
  VA-CSP PRIMARY CARE COLLABORATION NOTE

REMINDER TERM
  VA-REMINDER UPDATE_2_0_149
Non-exchangeable TIU object(s):
-----
TIU Object: PATIENT NAME
Object Method: S X=$$NAME^TIULO(DFN)
+      Enter ?? for more actions                                >>>
IA  Install all Components          IS  Install Selected Component
Select Action: Next Screen// IA

```

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.  
 Select Action: Next Screen// **IA Install all Components**  
 You will see several prompts, for all new entries you will choose **I to Install**  
 For an existing entry, you will choose **S to SKIP**

**You will be prompted to install the 1<sup>st</sup> reminder dialog component – You will choose to install all even though some components may have an X to indicate that they exist.**

```

Packed reminder dialog: VA-CSP CAREGIVER ASSESSMENT REV [NATIONAL DIALOG]

```

Item	Seq.	Dialog Findings	Type	Exists
1		VA-CSP CAREGIVER ASSESSMENT REV	dialog	X
2	5	VA-CSP CAREGIVER ASSESSMENT VERSION Finding: *NONE*	element	X
3	10	VA-CSP CAREGIVER ASSESSMENT INTRO REV Finding: *NONE*	element	X
4	20	VA-CSP COLLATERAL INFORMATION REV Finding: *NONE*	element	X
5	25	VA-CSP CAREGIVER ASSESS DATE OF ASSESS Finding: *NONE*	element	X
6	30	VAL-CSP GP CAREGIVER ASSESS CG IDENTIFIERS	group	X

```

+      + Next Screen      - Prev Screen      ?? More Actions
DD  Dialog Details      DT  Dialog Text          IS  Install Selected
DF  Dialog Findings     DU  Dialog Usage       QU  Quit
DS  Dialog Summary      IA  Install All
Select Action: Next Screen// IA

```

At the **Select Action** prompt, type **IA** to install the dialog – **VA-CSP CAREGIVER ASSESSMENT REV**  
 Select Action: Next Screen// **IA Install All**  
 Install reminder dialog and all components with no further changes: Y// **Yes**

```

Packed reminder dialog: VA-CSP CAREGIVER ASSESSMENT REV [NATIONAL DIALOG]
VA-CSP CAREGIVER ASSESSMENT REV (reminder dialog) installed from exchange file.
Item  Seq. Dialog Findings                                     Type  Exists
  1    VA-CSP CAREGIVER ASSESSMENT REV                       dialog  X
  2    5 VA-CSP CAREGIVER ASSESSMENT VERSION
      Finding: *NONE*                                       element  X
  3    10 VA-CSP CAREGIVER ASSESSMENT INTRO REV
      Finding: *NONE*                                       element  X
  4    20 VA-CSP COLLATERAL INFORMATION REV
      Finding: *NONE*                                       element  X
  5    25 VA-CSP CAREGIVER ASSESS DATE OF ASSESS
      Finding: *NONE*                                       element  X
  6    30 VAL-CSP GP CAREGIVER ASSESS CG IDENTIFIERS
                                         group    X
+      + Next Screen  - Prev Screen  ?? More Actions
DD  Dialog Details      DT  Dialog Text      IS  Install Selected
DF  Dialog Findings    DU  Dialog Usage    QU  Quit
DS  Dialog Summary     IA  Install All
Select Action: Next Screen// Q

```

After completing this dialog install, you will type **Q**.

**You will then be prompted to install the 2nd reminder dialog component – You will choose to install all even though some components may have an X to indicate that they exist.**

```

Packed reminder dialog: VA-CSP PRIMARY CARE COLLABORATION NOTE [NATIONAL DIALOG]
Item  Seq. Dialog Findings                                     Type  Exists
  1    VA-CSP PRIMARY CARE COLLABORATION NOTE               dialog
  2    1 VA-CSP VERSION NUMBER
      Finding: *NONE*                                       element
  3    5 VA-CSP INTRODUCTION
      Finding: *NONE*                                       element
  4    7 VA-BLANK LINE DIALOG & NOTE
      Finding: *NONE*                                       element  X
  5    10 VA-GP CSP OPTIONS
      Finding: *NONE*                                       group
  6    10.10 VA-CSP GP CAREGIVER COLLABORATED WITH PRIMARY
      CARE TEAM                                             group
+      + Next Screen  - Prev Screen  ?? More Actions
DD  Dialog Details      DT  Dialog Text      IS  Install Selected
DF  Dialog Findings    DU  Dialog Usage    QU  Quit
DS  Dialog Summary     IA  Install All
Select Action: Next Screen// IA

```

At the **Select Action** prompt, type **IA** to install the dialog – **VA-CSP PRIMARY CARE COLLABORATION NOTE**

Select Action: Next Screen// **IA Install All**

Install reminder dialog and all components with no further changes: Y// **Yes**

Item	Seq.	Dialog Findings	Type	Exists	
1		VA-CSP PRIMARY CARE COLLABORATION NOTE	dialog	X	
2	1	VA-CSP VERSION NUMBER Finding: *NONE*	element	X	
3	5	VA-CSP INTRODUCTION Finding: *NONE*	element	X	
4	7	VA-BLANK LINE DIALOG & NOTE Finding: *NONE*	element	X	
5	10	VA-GP CSP OPTIONS Finding: *NONE*	group	X	
6	10.10	VA-CSP GP CAREGIVER COLLABORATED WITH PRIMARY CARE TEAM	group	X	
+    + Next Screen    - Prev Screen    ?? More Actions					
DD	Dialog Details	DT	Dialog Text	IS	Install Selected
DF	Dialog Findings	DU	Dialog Usage	QU	Quit
DS	Dialog Summary	IA	Install All		
Select Action: Next Screen// Q					

After completing this dialog install, you will type **Q**.

Component	Category	Exists	
Source: GRIFFITH,ELIZABETH A at SALT LAKE CITY			
Date Packed: 08/05/2020@06:18:02			
Package Version: 2.0P46			
Description:			
The following Clinical Reminder items were selected for packing:			
REMINDER DIALOG			
VA-CSP CAREGIVER ASSESSMENT REV			
VA-CSP PRIMARY CARE COLLABORATION NOTE			
REMINDER TERM			
VA-REMINDER UPDATE_2_0_149			
Non-exchangeable TIU object(s):			
-----			
TIU Object: PATIENT NAME			
Object Method: S X=\$\$NAME^TIULO(DFN)			
+    + Next Screen    - Prev Screen    ?? More Actions    >>>			
IA	Install all Components	IS	Install Selected Component
Select Action: Next Screen// Q			

You will then be returned to this screen. At the **Select Action** prompt, type **Q**.

Install complete.

# Post Installation

---

## 1. Make the Dialog able to be attached to a Personal/Shared template and/or progress note title.

From the Reminders Manager Menu:

Select Reminder Managers Menu Option: **CP CPRS Reminder Configuration**

- CA Add/Edit Reminder Categories
- CL CPRS Lookup Categories
- CS CPRS Cover Sheet Reminder List
- MH Mental Health Dialogs Active
- PN Progress Note Headers
- RA Reminder GUI Resolution Active
- TIU TIU Template Reminder Dialog Parameter**
- DL Default Outside Location
- PT Position Reminder Text at Cursor

Select CPRS Reminder Configuration Option: **TIU TIU Template Reminder Dialog Parameter**

Reminder Dialogs allowed as Templates may be set for the following:

- 1 User USR [choose from NEW PERSON]
- 3 Service SRV [choose from SERVICE/SECTION]
- 4 Division DIV [choose from INSTITUTION]
- 5 System SYS [NATREM.FO-SLC.MED.VA.GOV]

Enter selection: **5** *Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level*

Setting Reminder Dialogs allowed as Templates for System:

Select Display Sequence: **?**

- 148 VA-VETERANS CHOICE NOTE
- 149 VA-TBI SCREENING

*When you type a question mark above, you will see the list of #'s (with dialogs) that are already taken. Choose a number **NOT** on this list. For this example, looking above I see the number 150 is not present, so I will use 150.*

Select Display Sequence: **150**

Are you adding 150 as a new Display Sequence? Yes// **Y YES**

Display Sequence: 150// **<Enter>** 150

Clinical Reminder Dialog: **VA-CSP PRIMARY CARE COLLABORATION NOTE**

then **<enter>** reminder dialog NATIONAL

OK? Yes// **<Enter>** (Yes)

Select Display Sequence: **151**

Are you adding 150 as a new Display Sequence? Yes// **Y YES**

Display Sequence: 150// **<Enter>** 151

Clinical Reminder Dialog: **VA-CSP CAREGIVER ASSESSMENT REV**

then **<enter>** reminder dialog NATIONAL

OK? Yes// **<Enter>** (Yes)

## 2. Setup of specific Note Titles

You will need to create two new note titles for these templates. The note titles needed are:  
CSP PCAFC PRIMARY CARE COLLABORATION  
CSP PCAFC CAREGIVER ASSESSMENT

You can place them in the same category as your other caregiver program notes.

*All the note titles above are to be mapped to the following VHA Enterprise Standard Title:  
CAREGIVER CERTIFICATE*

Note: Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the [TIU/ASU Implementation Guide](#)

## 3. Associate the new reminder dialogs with the note titles in CPRS

To do this, go to Template Editor, then Document Titles, select the appropriate folder (if applicable), and choose **New Template** (top right-hand corner).

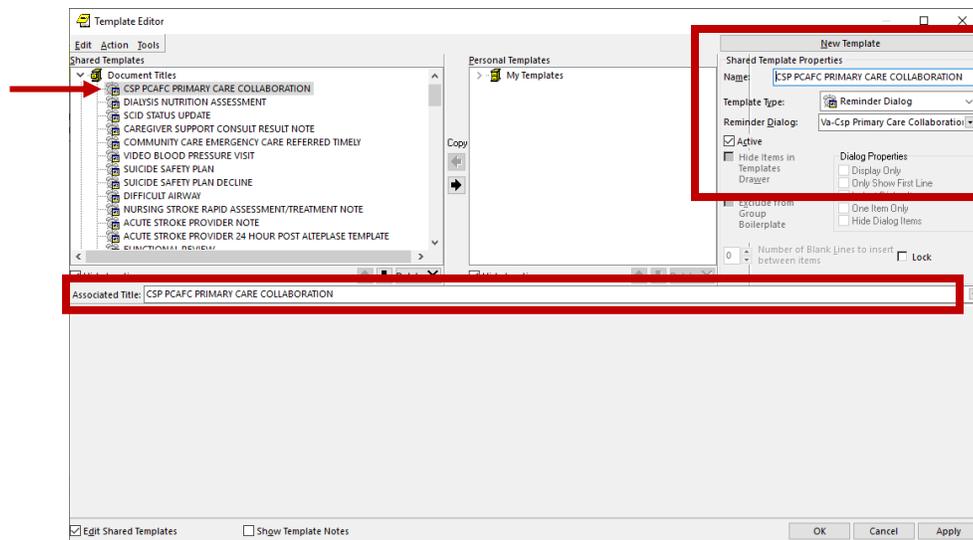
Type in the following information:

Name: **CSP PCAFC PRIMARY CARE COLLABORATION**

Template Type: **Reminder Dialog**

Reminder Dialog: **VA-CSP PRIMARY CARE COLLABORATION NOTE**

Next, type in the Associated Title, which in this case is **CSP PCAFC PRIMARY CARE COLLABORATION** and hit Apply.



Repeat the steps for the other note title:

Type in the following information:

Name: **CSP PCAFC CAREGIVER ASSESSMENT**

Template Type: **Reminder Dialog**

Reminder Dialog: **VA-CSP CAREGIVER ASSESSMENT REV**

Next, type in the Associated Title, which in this case is **CSP PCAFC CAREGIVER ASSESSMENT** and hit Apply.

4. Add the appropriate patient data objects to dialog text of the following elements:

VAL-TH VVC TELEPHONE TRIAGE CONTACT PHONE OBJECT  
VAL-TH VVC TELEPHONE TRIAGE PATIENT LOCATION HOME  
VAL-CSP INITIAL ASSESSMENT CAREGIVER ADDRESS/PHONE

*It is recommended you use a data object that includes the home address rather than mailing address if it is available.*

5. The dialog group below has PATIENT NAME and PATIENT DATE OF BIRTH data objects embedded in it, if these objects do not work for your site, please replace the object in the dialog text with a local version.

VAL-CSP GP CAREGIVER IDENTIFIERS

6. Add the appropriate data objects for ‘Active Problem List’, ‘Rated Disabilities’ and ‘Active Medications’ to the dialog text of the following elements:

VAL-CSP PATIENT INFORMATION  
VAL-CSP NAME OF PROVIDER

**NOTE:** *If there are any questions or problems during the installation, please notify your local IT support to log a national help desk ticket or contact the VA Service Desk and have them submit a national ticket to:*

*Category: Affected Service*

*Affected Service: VistA – CPRS: Clinical Reminders*

*Assignment Group: NTL SUP Clin 2*