**Department of Veterans Affairs**

# Office of Information & Technology (OIT) Product Development

**Mental Health Clinical Reminder Dialog Templates**



**Installation Guide**

## Patch PXRM\*2.0\*32

### November 2014

**Version 1.3**

**Revision History**

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# Introduction

This document describes the installation and setup for the national release of Mental Health Clinical Reminder (MHCR) Dialog Templates, Patch PXRM\*2.0\*32. Clinicians will use these templates to document mental health treatment using specified Evidence Based Psychotherapy (EBP) protocols, as requested by Mental Health Services (MHS).

Patch PXRM\*2.0\*32 contains reminder dialog templates in support of five EBP protocols. The templates will be accessed by mental health clinicians documenting therapy sessions through the CPRS Shared Template Drawer. There is no reminder definition, so no reminder logic is being used.

## Target audience

The intended user is familiar with the VistA computing environment (Kernel Installation and Distribution System [KIDS]).

## MHCR dialog titles for Patch PXRM\*2.0\*32

On the next page, a table lists the MHCR dialog titles for Patch PXRM\*2.0\*32 and the associated mandated template names for the configuration of these templates in the Shared Template drawer.. This step is required to facilitate clinician recognition of the correct templates, and this naming convention will be used in national provider training. The national EBP training programs have created clinician training materials based on the this naming convention, therefore the names, the order of those names, and the names of their enclosing folders should be followed – see note on page 14 (section 3.3.3).

|  |  |
| --- | --- |
| **Reminder Dialog Title** | **Mandated Template Drawer Name** |
| IPT - Interpersonal Psychotherapy for Depression |
| VA-MH IPT 1 DEPRESSION | IPT 1 Depression Initial |
| VA-MH IPT 2 DEPRESSION | IPT 2 Depression Intermediate |
| VA-MH IPT 3 DEPRESSION | IPT 3 Depression Termination |
| VA-MH IPT 4 DEPRESSION MAINT | IPT 4 Depression Maintenance |
| VA-MH IPT EARLY TERMINATION | IPT Early Termination |
| CBT-I - Cognitive Behavioral Therapy for Insomnia\* |
| VA-MH CBT-I 1 EVALUATION SESSION | CBT-I: 1 Evaluation Session |
| VA-MH CBT-I 2 INITIAL TREATMENT PHASE | CBT-I: 2 Initial Treatment Phase |
| VA-MH CBT-I 3 MIDDLE TREATMENT PHASE | CBT-I: 3 Middle Treatment Phase |
| VA-MH CBT-I 4 FINAL SESSION | CBT-I: 4 Final Session |
| VA-MH CBT-I EARLY TERMINATION | CBT-I: Early Termination |
| BFT - Behavioral Family Therapy |
| VA-MH BFT 1 ORIENTATION | BFT 1 Orientation Session |
| VA-MH BFT 2 EDUCATION SESSION | BFT 2 Education Session |
| VA-MH BFT 3 COMMUNICATION SESSION | BFT 3 Communication Session |
| VA-MH BFT 4 PROBLEM-SOLVING SESSION | BFT 4 Problem-Solving Session |
| VA-MH BFT 5 FINAL SESSION | BFT 5 Final Session |
| VA-MH BFT 6 EARLY TERMINATION | BFT Early Termination |
| SST - Social Skills Training |
| VA-MH SST 1 INITIAL | SST 1 Initial |
| VA-MH SST 2 GROUP VISIT | SST 2 Group Visit |
| VA-MH SST 3 FINAL VISIT | SST 3 Final Visit |
| VA-MH SST EARLY TERMINATION | SST Early Termination |
| IBCT - Integrative Behavioral Couple Therapy |
| VA-MH IBCT 1 INITIAL | IBCT 1 Initial |
| VA-MH IBCT 2 INDIVIDUAL | IBCT 2 Individual |
| VA-MH IBCT 3 NON VETERAN | IBCT 3 Non Veteran |
| VA-MH IBCT 4 FEEDBACK | IBCT 4 Feedback |
| VA-MH IBCT 5 THERAPY | IBCT 5 Therapy |
| VA-MH IBCT 6 TERMINATION | IBCT 6 Termination |
| VA-MH IBCT EARLY TERMINATION | IBCT Early Termination |

\*NOTE: The semicolon is needed on the CBT-I template names so that the I is not confused with a 1 (e.g. CBT-I: 1 Evaluation Session vs. CBT-I 1 Evaluation Session)

## Project references

|  |  |
| --- | --- |
| **Manuals & Guides** | **Documentation File name/ Web address** |
| Clinical Reminders User Manual | PXRM\_2\_20\_UM.PDF |
| Clinical Reminders Manager’s Manual | PXRM\_2\_MM.PDF |
| CPRS Technical Manual | [http://www.va.gov/vdl/documents/Clinical/Comp\_Patient\_Recrd\_Sys\_(CPRS)/cprslmtm.pdf](http://www.va.gov/vdl/documents/Clinical/Comp_Patient_Recrd_Sys_%28CPRS%29/cprslmtm.pdf) |
| CPRS User Guide: GUI Version | [http://www.va.gov/vdl/documents/Clinical/Comp\_Patient\_Recrd\_Sys\_(CPRS)/cprsguium.pdf](http://www.va.gov/vdl/documents/Clinical/Comp_Patient_Recrd_Sys_%28CPRS%29/cprsguium.pdf) |
| Health Summary Technical Manual | <http://www.va.gov/vdl/documents/Clinical/CPRS-Health_Summary/hsum2_7_tm.pdf> |
| **V***ist***A** MHA 3 Installation GuidePATCH YS\*5.01\*105 | <http://www.va.gov/vdl/application.asp?appid=78> |

|  |  |  |
| --- | --- | --- |
| **Web Sites** | **URL** | **Description** |
| National Clinical Reminders site | <http://vista.med.va.gov/reminders> | Contains manuals, PowerPoint presentations, and other information about Clinical Reminders. |
| National Clinical Reminders Committee | [http://vaww.portal.va.gov/sites/ncrc](http://vaww.portal.va.gov/sites/ncrcpublic/default.aspx) [public/default.aspx](http://vaww.portal.va.gov/sites/ncrcpublic/default.aspx) | This committee directs the development of new and revised national reminders. |
| VistA Documentation Library | <http://www.va.gov/vdl/> | Contains manuals for Clinical Reminders and CPRS. |

## Acronyms and definitions

|  |  |
| --- | --- |
| Acronyms | Definition |
| ASU | Authorization/Subscription Utility |
| CAC | Clinical Application Coordinator |
| Clin4 | National Customer Support team that supports Clinical Reminders |
| CPRS | Computerized Patient Record System |
| GMTS | Health Summary namespace (also HSUM) |
| GUI | Graphic User Interface |
| ICD-9 | International Classification of Diseases, 9th Edition |
| MHCR | Mental Health Clinical Reminder |

|  |  |
| --- | --- |
| MHS | Mental Health Services (previously OMHS) |
| MHTC | Mental Health Treatment Coordinator |
| OHI | Office of Health Information |
| OI | Office of Information |
| OIT/OI&T | Office of Information Technology |
| OMHS | Office of Mental Health Services (now MHS) |
| PTM | Patch Tracker Message |
| PXRM | Clinical Reminder Package Namespace |

## Section 508 compliance

The Veterans Health Administration (VHA) fully supports Section 508 of *The Rehabilitation Act* and is committed to equal access for all users. The MHCR dialog templates project was evaluated according to parameters. Because the templates are a minor addition to VistA CPRS and use VistA tools, Section 508 compliance was determined to be N/A.

# Pre-Installation

## Installation system notes and requirements

#### VistA Operating System

Mental Health Clinical Reminders Dialog Templates – PXRM\*2.0\*32 patch, as well as CPRS, and MHA currently run on the standard hardware platforms used by the Department of Veterans Affairs Health Care System facilities. These systems consist of standard or upgraded Alpha AXP clusters, and run either Cache-VMS or Cache-NT and the Open M product.

#### MHCR Software Application Installation Time

MHCR Patch PXRM\*2.0\*32 installation time takes approximately 10-15 minutes during off peak hours.

#### Users on the System

Users may remain on the system. However, the installation should be done during off- peak hours.

#### Kernel Installation and Distribution System (KIDS)

PXRM\*2.0\*32 is created using the Kernel Installation and Distribution System (KIDS). For further instructions on using KIDS, please refer to the Kernel V.8.0 Systems Manual.

#### Namespace

Mental Health Clinical Reminder Patch PXRM\*2.0\*32 namespace is PXRM.

## Software retrieval

Your site will receive the Mental Health Clinical Reminders Dialog Template files as part of patch PXRM\*2.0\*32 via a host file. The preferred method is to FTP the files from:

**download.vista.med.va.gov**

This location automatically transmits files from the first available FTP Server to the appropriate directory on your system. (See the order listed below under the FTP Address column). If you prefer, you can retrieve the software *directly* from one of the FTP Servers listed below, under the FTP Address column.

|  |  |  |
| --- | --- | --- |
| **OI Field Office** | **FTP Address** | **Directory** |
| Albany (NY) | REDACTED | REDACTED |
| Hines (IL) | REDACTED | REDACTED |
| Salt Lake City (UT) | REDACTED | REDACTED |

## Security management

There are no unique legal requirements pertaining

## Backup routines

No routines are being installed by this content-only patch; however, we recommend performing a backup of the transport global before installing the VistA MHCR Dialog Templates Patch PXRM\*2.0\*32.

The option called Backup a Transport Global [XPD BACKUP] creates a MailMan message that backs up all current routines on your system that would be replaced by a KIDS patch. This option is under the Installation menu of the KIDS menu. It works on a patch that has been loaded on your system, but not installed.

**Example**

**le of the option “Backup a Transport Global:”**

**Select Installation Option: B <ENTER>** ckup a Transport Global Select INSTALL NAME: PXRM\*2.0\*32

Loaded from Distribution 10/30/13@16:25

=> Initial MH reminders ;Created on

This Distribution was loaded on Oct 30, 2013@16:25

with header of Initial MH reminders ;Created on Oct 30, 2013@16:25 It consisted of the following Install(s):

PXRM\*2.0\*32

Subject: Backup of PXRM\*2.0\*32 install on Oct 30 Replace **<ENTER>**

Loading Routines for PXRM\*2.0\*32 Routine PXRMBLD is not on the disk....

Send mail to: IT,PROGRAMMER // **<ENTER>**

IT,PROGRAMMER

Select basket to send to: IN// **<ENTER>**

And Send to: **<ENTER>**

## Backout plan (optional)

### To remove the Reminder Exchange Entries from VistA

* + - 1. Select the Reminder Exchange Menu Option.
			2. Select the Exchange File entries that were installed by this patch. Example: CPT 1 Initial

**Warning**: There is no confirmation question prior to the delete function in step 3.

* + - 1. Select the number that matches the entry you want to remove; this will select the option: DFE Delete Exchange File Entry.

The Exchange File Entry is deleted.

### To delete the templates from VistA

In order to back out of the existing MHCR Dialog Templates, you must delete the templates that were added during installation.

* + - 1. Open CPRS and select any patient, then click the **Options** tab and select **Edit Shared Templates…**

The Template Editor screen opens.

* + - 1. Click **Action**, then select **Delete**.
			2. Select the MHCR dialog templates list, then select the name of a template to be deleted.

A confirmation message appears.

* + - 1. Click **Yes** to confirm your delete.
			2. Repeat steps 3-4 for all templates that were added during installation. Backout is complete.

# Installing KIDS

Users **MAY** remain on the system, but installation should be done at **off peak hours** when use is low. The estimated installation time is 10-15 minutes.

1. Use the ‘LOAD A DISTRIBUTION’ option on the PackMan menu. The Host File name is: PXRM\_2\_0\_32.KID
2. Answer YES to the question: “Want to Continue with Load? YES//” The patch has now been loaded into a Transport global on your system.
3. Use the KIDS option to install the Transport Global.
4. On the KIDS menu, under the ‘Installation’ menu, use the following options to print, compare, verify, and back up the transport global:
	* Print Transport Global
	* Compare Transport Global to Current System
	* Verify Checksums in Transport Global
	* Backup a Transport Global
5. From the ‘Installation Menu’ of the KIDS menu, run the option ‘Install Package(s)’, and then select the package ‘PXRM\*2.0\*32’ and proceed with the install.
6. When prompted ‘Want KIDS to Rebuild Menu Trees Upon Completion of Install’? NO// ‘
7. Answer THE FOLLOWING according to your site's policy.
8. When prompted 'Want KIDS to INHIBIT LOGONs during the install?” NO //’,respond NO
9. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//’, respond NO

## Installation

For an example of loading a distribution, see the [appendix](#_bookmark22).

## KIDS Utilities Options (Optional)

**Print a List of Package Components using the “Utilities” menu options available with KIDS**

Use the KIDS “**Build File Print”** option if you would like a complete listing of package components (e.g., routines and options) exported with this software.

>**D ^XUP**

Setting up programmer environment Terminal Type set to: C-VT100

Select OPTION NAME: **XPD** MAIN Kernel Installation & Distribution System menu Edits and Distribution ...

Utilities ... Installation ...

Select Kernel Installation & Distribution System Option: **UT**ilities Build File Print

Install File Print

Convert Loaded Package for Redistribution Display Patches for a Package

Purge Build or Install Files Rollup Patches into a Build Update Routine File

Verify a Build

Verify Package Integrity

Select Utilities Option: **Bu**ild File Print

Select BUILD NAME: **PXRM\*2.0\*32** CLINICAL REMINDERS CLINICAL REMINDERS RECORD SYSTEM

DEVICE: HOME// TELNET

#### Print Results of the Installation Process

Select Kernel Installation & Distribution System Option: **UT**ilities

Build File Print Install File Print Edit Install Status

Convert Loaded Package for Redistribution Display Patches for a Package

Purge Build or Install Files Rollup Patches into a Build Update Routine File

Verify a Build

Verify Package Integrity

**EXAMPLE: Install File Print**

Select Utilities Option: **IN**stall File Print

Select INSTALL NAME: **PXRM\*2.0\*32**

PXRM\*2.0\*32 Install Completed 10/30/13@19:26:15

=> PXRM\*2.0\*32 ;Created on Oct 15, 2013@13:18:44 DEVICE: HOME// **<ENTER>** or Select another print device name

PACKAGE: PXRM\*2.0\*32 Nov 07, 2013 8:50 pm PAGE 1

**COMPLETED ELAPSED**

STATUS: Install Completed DATE LOADED: OCT 30,2013@19:18:12 INSTALLED BY: PROGRAMMER,ONE

NATIONAL PACKAGE: CLINICAL REMINDERS

**(Example: Install File Print continued)**

INSTALL STARTED: OCT 30,2013@19:24:24 19:26:15 0:01:51

ROUTINES: 19:24:24

PRE-INIT CHECK POINTS:

XPD PREINSTALL STARTED 19:24:24 XPD PREINSTALL COMPLETED 19:24:24

FILES:

REMINDER EXCHANGE 19:24:24

POST-INIT CHECK POINTS:

XPD POSTINSTALL STARTED 19:26:15 0:01:51

XPD POSTINSTALL COMPLETED 19:26:15

INSTALL QUESTION PROMPT ANSWER

XPI1 Want KIDS to INHIBIT LOGONs during the install NO

XPZ1 Want to DISABLE Scheduled Options, Menu Options, and Protocols NO MESSAGES:

Install Started for PXRM\*2.0\*32: Oct 30, 2013@19:24:24

Build Distribution Date: Oct 15, 2013

Installing Routines:

Oct 30, 2013@19:24:24

Running Pre-Install Routine: PRE^PXRMP32I

DISABLE options.

DISABLE protocols.

Installing Data Dictionaries:

Oct 30, 2013@19:24:24

Installing Data:

Oct 30, 2013@19:24:24

Running Post-Install Routine: POST^PXRMP32I ENABLE options.

ENABLE protocols.

There are 1 Reminder Exchange entries to be installed.

1. Installing Reminder Exchange entry VA-MH EBP DIALOGS INCREMENT 3

Updating Routine file...

Updating KIDS files...

PXRM\*2.0\*32 Installed. Oct 30, 2013@19:26:15

## CPRS Template Installation

The following section details how you will use the TIU menu option "CPRS REMINDER CONFIGURATION" to prepare the newly installed dialog templates for use. This sets the access level for the templates to be made available for use in the Progress Note template drawer.

Typically, the Clinical Application Coordinator (CAC) is designated to modify the Shared Templates folder, although this may not be the case at your facility.

### Setting the User Class

Before you can edit the Shared Templates, you must set the User Class.

1. Select **CPRS Configuration (IRM) Option**.

#### Select General Parameter Tools Menu Option.

1. Select **Edit Parameter Values**.
2. Select **PARAMETER DEFINITION NAME: TIU FIELD EDITOR CLASSES**, then set the parameter values. Normally the Clinical Coordinator User Class is set at a SYSTEM Level.

EXAMPLE: Values for TIU FIELD EDITOR CLASSES

Parameter

Instance

Value

SYS: VISTA.TEST.ORG 10

CLINICAL COORDINATOR

### Preparing the templates

1. Select **CPRS Reminder Configuration (**located on the Reminder Managers Menu).


#### Reminder Managers Menu

The CPRS Reminder Configuration menu opens.

1. Select **TIU Template Reminder Dialog Parameter**. This allows you to enter the MHCR dialog templates to be accessed via the Shared template functionality as standalone templates, or as templates linked to TIU titles.

**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 NP New Reminder Parameters**

**GEC GEC Status Check Active WH WH Print Now Active**

**Select CPRS Reminder Configuration Option: TIU <Enter> TIU Template Reminder Dialog Parameter**

#### CPRS Reminder Configuration Menu

1. The example below reflects a selection at the “SYSTEM” level. This level is recommended for ALL CPRS user access. Depending on the organization at your individual facility, determine whether to set the dialogs or reminders to the User, Service, Division or SYSTEM Levels access.

**Reminder Dialogs allows as Templates may be set for the following:**

**1 User USR [choose from NEW PERSON]**

1. **Service SRV [choose from SERVICE/SECTION]**
2. **Division DIV [SOFTWARE SERVICE]**
3. **System SYS [VISTA.TEST.ORG]**
4. Enter selection: **5 System VISTA.TEST.ORG**

Setting Reminder Dialogs allows as Templates for System: VISTA.TEST.ORG Select Display Sequence: ? <ENTER> to display the list of available templates for

editing. The listing below contains reminder dialogs from previous release with names similar to the reminder dialogs being released with this patch.

**Display Sequence Value**

**---------------- -----**

**1 VA-MH ACT FOR DEPRESSION 3 CLOSING PHASE**

**5 VA-MH ACT FOR DEPRESSION 2 ACTION PHASE**

**10 VA-MH ACT FOR DEPRESSION 1 BEGINNING PHASE**

**15 VA-MH ACT FOR DEPRESSION EARLY TERMINATION**

**20 VA-MH CBT-D 3 FINAL PHASE**

**25 VA-MH CBT-D 2 MIDDLE PHASE**

**30 VA-MH CBT-D 1 INITIAL PHASE**

**35 VA-MH CBT-D EARLY TERMINATION**

**40 VA-MH CPT 12 FINAL**

**45 VA-MH CPT 7 PROBLEMATIC THINKING**

**50 VA-MH CPT 6 CHALLENGING QUESTIONS**

**55 VA-MH CPT 11 ESTEEM**

**60 VA-MH CPT 9 TRUST**

**65 VA-MH CPT 10 POWER CONTROL**

**70 VA-MH CPT 8 SAFETY**

**75 VA-MH CPT 5 REWRITE EVENT**

**80 VA-MH CPT 4 TRAUMA EVENT SESSION**

**85 VA-MH CPT 3 ABC SHEET**

**90 VA-MH CPT 1 INDIVIDUAL INITIAL**

**95 VA-MH CPT EARLY TERMINATION**

**100 VA-MH CPT 2 MEANING SESSION**

**105 VA-MH PEI 6 EARLY TERMINATION**

**110 VA-MH PEI 3RD SESSION**

**115 VA-MH PEI 2ND SESSION**

**120 VA-MH PEI 1 INITIAL**

**125 VA-MH PEI 5 FINAL SESSION**

**130 VA-MH PEI 4 IMAGINAL SESSIONS**

**135 VA-MH IPT 1 DEPRESSION**

**140 VA-MH IPT 2 DEPRESSION**

**145 VA-MH IPT 3 DEPRESSION**

**150 VA-MH IPT 4 DEPRESSION MAINTENANCE**

**155 VA-MH IPT EARLY TERMINATION**

**160 VA-MH CBT-I 1 EVALUATION SESSION**

**165 VA-MH CBT-I 2 INITIAL TREATMENT PHASE**

**170 VA-MH CBT-I 3 MIDDLE TREATMENT PHASE**

1. **VA-MH CBT-I 4 FINAL SESSION**
2. **VA-MH CBT-I EARLY TERMINATION**

**180 VA-MH BFT 1: ORIENTATION SESSION**

**185 VA-MH BFT 2: EDUCATION SESSION**

**190 VA-MH BFT 3: COMMUNICATION SESSION**

**195 VA-MH BFT 4: PROBLEM-SOLVING SESSION**

**200 VA-MH BFT 5: FINAL SESSION**

**205 VA-MH BFT 6: EARLY TERMINATION**

**210 VA-MH SST 1 INITIAL**

**215 VA-MH SST 2 GROUP VISIT**

**220 VA-MH SST 3 FINAL VISIT**

**225 VA-MH SST EARLY TERMINATION**

**230 VA-MH IBCT 1 INITIAL**

**235 VA-MH IBCT 2 INDIVIDUAL**

**240 VA-MH IBCT 3 NON VETERAN**

**245 VA-MH IBCT 4 FEEDBACK**

**250 VA-MH IBCT 5 THERAPY**

**255 VA-MH IBCT 6 TERMINATION**

**260 VA-MH IBCT EARLY TERMINATION**

1. Select Display Sequence**: 1** <ENTER> ( Select the entry to edit by the number associated with the Dialog title)

Display Sequence: 1// <ENTER>

Clinical Reminder Dialog: VA-CPT 1 INDIVIDUAL INITIAL// VA-CPT 1 INDIVIDUAL INITIAL reminder dialog NATIONAL

...OK? Yes// (Yes) <ENTER>

1. Select Display Sequence: Enter additional Display Sequence

--OR--

<ENTER> if no more entries to edit.

### Adding the templates to the CPRS template drawer

1. Open CPRS and select any patient, then click **Options** and select **Create New Shared Template…**


#### CPRS Options menu

The Template Editor screen opens, showing a Shared Template Properties section with an editable Name field, a Template Type list, and an Active check box.


#### Shared Template Properties section of Template Editor screen

1. Type the name of a new template (notice that the template name appears on the left side of the screen, in the list of Shared Templates). Make sure that the Active check box is checked. Below is a list of mandated template drawer names for the Evidence-Based Psychotherapy (EBP) Reminder Dialogs.

**Note**: Each EBP training program will educate their staff trainees and MH providers on the use of these EBP templates, and uniform naming will assist staff in knowing how to complete certain fields in specific reminder dialogs. Mental Health Services (VACO) *mandates* that the following names be used when adding these reminder dialogs to the local CPRS template drawer:

**Behavioral Family Therapy - BFT**

* + BFT 1 Orientation
	+ BFT 2 Education
	+ BFT 3 Communication
	+ BFT 4 Problem-Solving
	+ BFT 5 Final Session
	+ BFT Early Term

**Cognitive Behavioral Therapy for Insomnia - CBT-I \***

* + CBT-I: 1 Evaluation
	+ CBT-I: 2 Initial
	+ CBT-I: 3 Middle
	+ CBT-I: 4 Final Session
	+ CBT-I: Early Term

*\*Please place a colon (:) following CBT-I so that the capital I does not visually join with its following numbers; otherwise, the template appears to be named (for example) CBT-11 Evaluation versus CBT-I: 1 Evaluation.*

**Integrative Behavioral Couple Therapy - IBCT**

* + IBCT 1 Initial
	+ IBCT 2 Individual
	+ IBCT 3 Non-Veteran
	+ IBCT 4 Feedback
	+ IBCT 5 Therapy
	+ IBCT 6 Termination
	+ IBCT Early Term

**Interpersonal Psychotherapy for Depression - IPT**

* + IPT-D 1 Initial
	+ IPT-D 2 Intermediate
	+ IPT-D 3 Termination
	+ IPT-D 4 Maintenance
	+ IPT-D Early Term

**Social Skills Training - SST**

* + SST 1 Initial
	+ SST 2 Group Visit
	+ SST 3 Final Visit
	+ SST Early Term
1. Click the Template Type list, then select **Reminder Dialog**.


#### Shared Template Properties section with arrow pointing to the selection in the Template Type list

The reminder dialog template names appear below the Template Type field as shown in the screen shot below step 4.

1. Verify the selections, then click **Apply**.



#### Reminder Dialog section with arrow pointing to template names, and another arrow pointing to the Apply button

### Verifying that the templates are properly installed

1. Open CPRS and select any patient, then click **Notes**, then click **Templates**. The Shared Templates icon displays.
2. Expand the Shared Templates drawer.
3. Verify that the expanded list of Shared Templates lists the Patch PXRM\*2.0\*32 protocols and their templates as shown below.

**Note**: The example may also show template titles from the previous increment.



#### Expanded list of templates

See the MHCR PXRM\*2.0\*32 Dialog Templates User Guide (PXRM\_2\_0\_32\_UG.PDF) for specific instructions on accessing and using the individual dialog templates included in this patch.

# Appendix - Example of an installation

The steps are provided as prompts on your screen. User response is in **Bold** characters. Select Kernel Installation & Distribution System Option: **Installation <Enter>**

* 1. *Load a Distribution*
	2. Verify Checksums in Transport Global
	3. Print Transport Global
	4. Compare Transport Global to Current System
	5. Backup a Transport Global
	6. Install Package(s)

Restart Install of Package(s) Unload a Distribution

Select Installation Option: **1 <Enter>** Load a Distribution Enter a Host File: <your directory>\**PXRM\_2\_0\_32.KID**

KIDS Distribution saved on Oct 30, 2013@19:18:12

Comment: PXRM\*2.0\*32

This Distribution contains Transport Globals for the following Package(s): PXRM\*2.0\*32

Distribution OK!

Want to Continue with Load? YES// **<Enter>**

Loading Distribution...

PXRM\*2.0\*32

Use INSTALL NAME: PXRM\*2.0\*32 to install this Distribution.

Select INSTALL NAME: **PXRM\*2.0\*32<Enter>**

Loaded from Distribution 10/30/13@19:18:12

=> PXRM\*2.0\*32;Created on Oct 15, 2013@13:18:44

This Distribution was loaded on Oct 30, 2013@19:18:12 with header of PXRM\*2.0\*32;Created on Oct 15, 2013@13:18:44

It consisted of the following Install(s): PXRM\*2.0\*32

Checking Install for Package PXRM\*2.0\*32

Install Questions for PXRM\*2.0\*32

Incoming Files:

811.8 REMINDER EXCHANGE (including data)

Note: You already have the 'REMINDER EXCHANGE' File. I will OVERWRITE your data with mine.

Want KIDS to INHIBIT LOGONs during the install? **NO// <Enter>**

Want to DISABLE Scheduled Options, Menu Options, and Protocols? **NO// <Enter>**

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// **<Enter>**

Install Started for PXRM\*2.0\*32: Oct 30, 2013@19:24:24

Build Distribution Date: Oct 15, 2013

Installing Routines:

Oct 30, 2013@19:24:24

Running Pre-Install Routine: PRE^PXRMP32I

DISABLE options.

DISABLE protocols.

Installing Data Dictionaries: Oct 30, 2013@19:24:24

Installing Data:

Oct 30, 2013@19:24:24

Running Post-Install Routine: POST^PXRMP32I

PXRM\*2.0\*32

ENABLE options.

ENABLE protocols.

There are 1 Reminder Exchange entries to be installed.

1. Installing Reminder Exchange entry VA-MH EBP DIALOGS INCREMENT 3

Updating Routine file...

Updating KIDS files...

PXRM\*2.0\*32 Installed. Oct 30, 2013@19:26:15

Install Message Sent

100% | 25 50 75 |

Complete [ ]

Install Completed