Update _2_0_70

Clinical Reminders

VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE

Install Guide

January 2019

Product Development
Office of Information Technology
Department of Veterans Affairs

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Introduction

Description:

As part of the TriWest expansion efforts, VA is continuing to align and streamline processes across all areas of the organization. Standardization of the 10-0386 and 10-0386SCH form is a critical piece of both the overall standardization as well as a step in streamlining the process. Under the contracts previously, a majority of sites were not able to internally handle the scheduling functions, as required in the future state Community Care Network (CCN) contracts. National rollout of the 10-0386/10-0386SCH form allows sites to perform the scheduling and care coordination functions for our Veterans while still utilizing TriWest for their network and timely payment to providers.

When you install this, it will overwrite any local changes made (facility info) to the old 10-0386 and 10-0386A notes. You will be able to add this information again after install.

UPDATE_2_0_70 contains 1 Reminder Exchange entry:
UPDATE_2_0_70 VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE

The exchange file contains the following components:

TIU TEMPLATE FIELD
VA-10-0386A EDIT 30-40 REQ
VA-10-0386 EDIT 30-40
VA-10-0386 WP 2 LINE
VA-10-0386 ALT POC TXT
VA-10-0386 CALENDAR
VA-10-0386 PLEASE NOTE TXT
VA-10-0386 WP 2 LINE REQ
VA-10-0386 NUMBER OF VISITS TXT
VA-10-0386 SERVICE/PROCEDURE TXT
VA-10-0386 SPECIALIST TXT
VA-10-0386 CAT OF CARE TXT
VA-10-0386 CALENDAR REQ
VA-10-0386 CID TXT
VA-10-0386A EDIT 40 REQ
VA-10-0386 AA# PLEASE SPECIFY
AK-10-0386A SAR STATEMENT INFO1
VA-10-0386 WORD 70-3 REQ
AK-10-0386A SAR STATEMENT INFO6
AK-10-0386A SAR STATEMENT INFO4
AK-10-0386A SAR STATEMENT INFO5
AK-10-0386A SAR STATEMENT INFO2
TEXT (1-20 CHAR)
TEXT (1-10 CHAR)REQ

TEXT (1-30 CHAR) REQ
TEXT (1-40 CHAR) REQ
DATE & TIME (REQ)
EDIT 20 10-0386 SCH
EDIT 50 CHOICE
ANC-10-0389-SCH SERVICE/VISIT INFO DISPLAY
AK-10-0386 WORD 70-3 REQ
VA-10-0386-SCH CC/SPECIALIST
AK CHOICE CONSULTS
VA-10-0386-SCH CC/SPEC DISPLAY
VA-CID DISPLAY TEXT1

HEALTH FACTORS
VA-REMINDER UPDATES
VA-UPDATE_2_0_70
VETERANS CHOICE
CHOICE SECONDARY AUTH DISAPPROVED
CHOICE SECONDARY AUTH TIME & SERVICES
CHOICE SECONDARY AUTH SERVICES
CHOICE SECONDARY AUTH TIME
CHOICE SECONDARY AUTHORIZATION
CHOICE APPOINTMENT
CHOICE 10-0386 REFERRAL URG
CHOICE 10-0386 URGENT
CHOICE 10-0386 ROUTINE
CHOICE UN/EX BURDEN
CHOICE FIRST SERVICES UA
CHOICE 40 MILE
CHOICE 30 DAY

REMINDER SPONSOR
VHA Office of Community Care

REMINDER TERM
VA-REMINDER UPDATE_2_0_70

REMINDER DIALOG
VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE

Install Details

This update is being distributed as a web host file. The address for the host file is:
http://vista.med.va.gov/reminders/UPDATE_2_0_70.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 10 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
Select Action: Next Screen// LWH   Load Web Host File
Input the URL for the .prd file: http://vista.med.va.gov/reminders/UPDATE_2_0_70.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:
http://vista.med.va.gov/reminders/UPDATE_2_0_70.PRD

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

Search and locate an entry titled **UPDATE_2_0_70 VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE** in reminder exchange.

```
+Item   Entry                          Source                  Date Packed
  126   UPDATE_2_0_70 VA-VHA CHOICE/PC  GRIFFITH@SALT LAKE CI   12/14/2018@07:59
        CC APPROVAL FOR MEDICAL CARE
  127   UPDATE_2_0_71 VA-ORAL CARE      SMALLEY@SALT LAKE CI    12/13/2018@12:57
        TEMPLATE
  128   UPDATE_2_0_8 MH UPDATES         MONTGOMERY@SALT LAKE CI 02/24/2017@12:44
  129   UPDATE_2_0_9 VA-COLORECTAL      GRIFFITH@SALT LAKE CI   07/21/2017@05:39
        CANCER SCREENING
  130   UPDATE_2_0_9 VA-COLORECTAL      GRIFFITH@SALT LAKE CI   03/20/2018@08:45
        CANCER SCREENING
  131   UPDATE_2_0_9 VA-COLORECTAL      GRIFFITH@SALT LAKE CI   07/21/2017@05:42
+          + 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
Select Action: Next Screen// IFE   Install Exchange File Entry
Enter a list or range of numbers (1-212): 126
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry titled **UPDATE_2_0_70 VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE** (in this example it is entry 126 it will vary by site)

```
       Component                                      Category      Exists
Source:       GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 12/14/2018@07:59:52
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE

REMINDER TERM
  VA-REMINDER UPDATE_2_0_70
Non-exchangeable TIU object(s):
------------------------------------------------------------------------
TIU Object: PATIENT NAME
Object Method: S X=$$NAMEˆTIULO(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 components that already exists but the packed component is different, you will choose **O to Overwrite.**

You will be promped to install the reminder dialog component:

```
Packed reminder dialog: VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE [NATIONAL D

 Item  Seq. Dialog Findings                              Type       Exists
   1     VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE     dialog

   2   5 GP VHA CHOICE/PCCC APPROVAL PROGRAM             group
          Finding: *NONE*
   3   5.5 GP VHA CHOICE PROGRAM                         group
          Finding: *NONE*
   4   5.5.5 GP VHA CHOICE/PCCC VA SCHEDULES             group
          Finding: *NONE*
   5   5.5.5.10 GP-10-0386-SCH MAIN                      group
          Finding: *NONE*
   6   5.5.5.10.10 GP-10-0386-SCH APPROVAL AUTH          group
          Finding: *NONE*
   7   5.5.5.10.10.5 GP-10-0386-SCH URGENCY              group
          Finding: *NONE*
   8   5.5.5.10.10.5.10 GP-10-0386-SCH URGENCY ROUTINE   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-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE**

Select Action: Next Screen// IA   Install All

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

```
Packed reminder dialog: VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE [NATIONAL D
VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE (reminder dialog) installed from ex
 Item  Seq. Dialog Findings                                    Type     Exists
    1      VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE         dialog      X

    2   5 GP VHA CHOICE/PCCC APPROVAL PROGRAM                   group       X
           Finding: *NONE*
    3   5.5 GP VHA CHOICE PROGRAM                               group       X
           Finding: *NONE*
    4   5.5.5 GP VHA CHOICE/PCCC VA SCHEDULES                   group       X
           Finding: *NONE*
    5   5.5.5.10 GP-10-0386-SCH MAIN                            group       X
           Finding: *NONE*
    6   5.5.5.10.10 GP-10-0386-SCH APPROVAL AUTH                group       X
           Finding: *NONE*
    7   5.5.5.10.10.5 GP-10-0386-SCH URGENCY                    group       X
           Finding: *NONE*
    8   5.5.5.10.10.5.10 GP-10-0386-SCH URGENCY ROUTINE         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
```

When the dialog has completed installation, you will then be returned to this screen. At the **Select Action** prompt, type **Q.**

```
          Component                                      Category    Exists
Source:      GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 12/14/2018@07:59:52
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE

REMINDER TERM
  VA-REMINDER UPDATE_2_0_70
Non-exchangeable TIU object(s):
-------------------------------------------------------------------------------
TIU Object: PATIENT NAME
Object Method: S X=$$NAMEˆTIULO(DFN)

+          Enter ?? for 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 or to a 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**: type in the name of the dialog**
   VA-VHA CHOICE/PCCC APPROVAL FOR MEDICAL CARE then **<enter>**
   reminder dialog NATIONAL
   OK? Yes// **<Enter>** (Yes)

2. **Setup of Note title/ Associate the reminder dialog with the note title or shared template in CPRS**

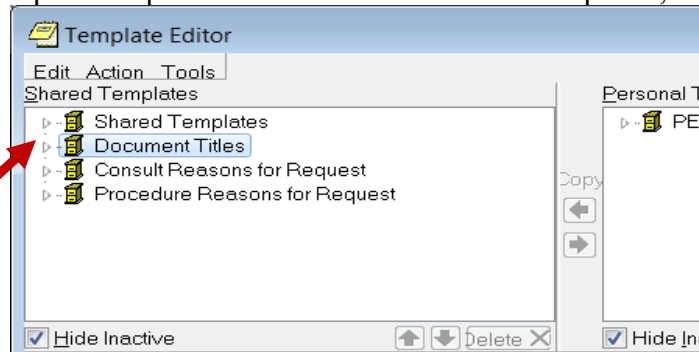The VA-VHA CHOICE/PCCC Reminder Dialog should be set up with its own note title.

Using the document definition manager, create the following note title in the document class where other community care notes are stored at your facility.

Name: COMMUNITY CARE TRIWEST EXPANSION SCHEDULING
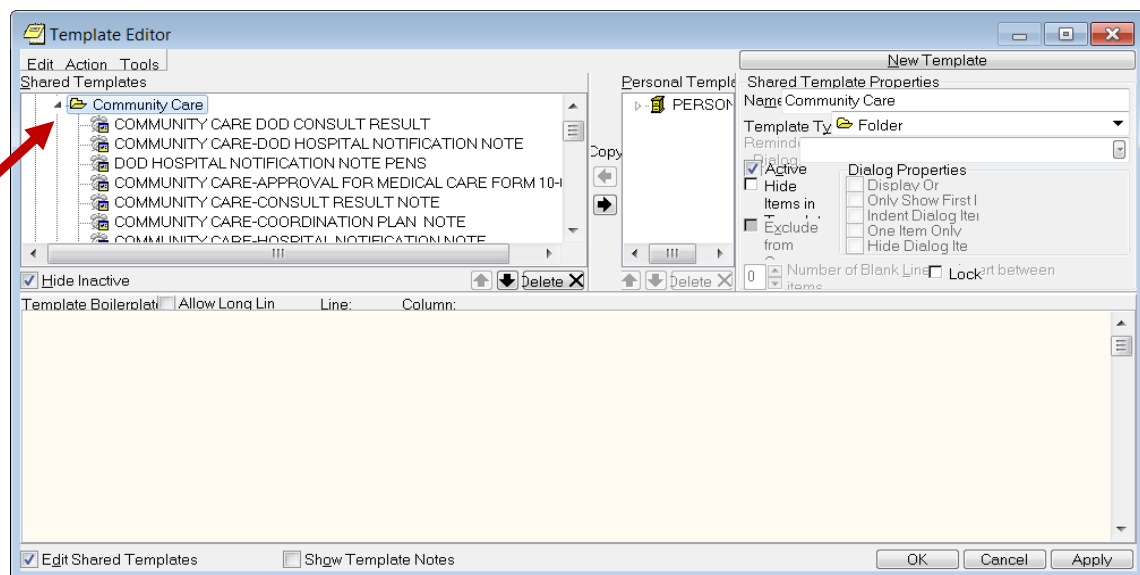VHA Enterprise Standard Title: NONVA NOTE

Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the TIU/ASU Implementation Guide.

You will need to connect the document definition to the reminder dialog

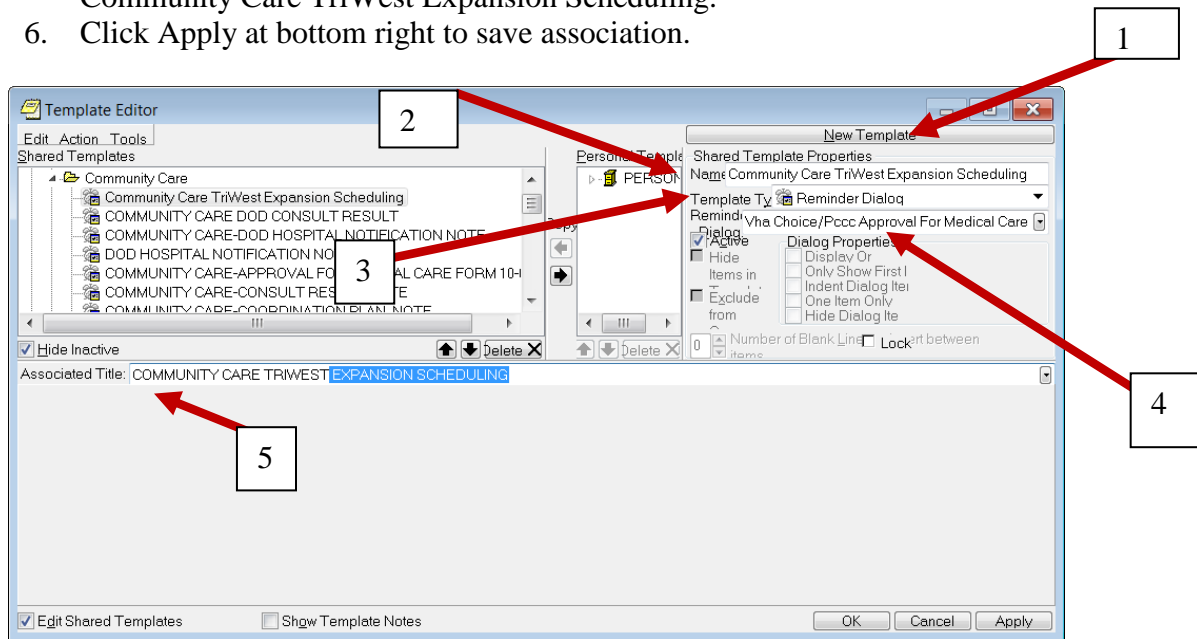Open Template Editor and from Shared Templates, select File "Document Titles"

Click 'triangle' to left of Document Titles to expand. Select the folder where the title *Community Care TriWest Expansion Scheduling* note will be located.

Now go to Shared Template Properties located at right side of screen above.

1. Click "New Template"
2. Enter Community Care TriWest Expansion Scheduling in the name field.
3. Select Reminder Dialog for the Template Type.
4. In the Reminder Dialog box, search for Va-Vha Choice/PCCC Approval. The reminder dialog name will display and highlight in blue.
5. In the Associated Title field-type in Community Care, and select the title Community Care TriWest Expansion Scheduling.
6. Click Apply at bottom right to save association.

Test the progress note title in CPRS to see new template is attached.

3. Insert your local data objects.

A. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for group:
VAL-10-0386-SCH APPROVAL AUTH VAMC INFO.   Edit the dialog text and replace the text fields with your local facility information.

B. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to Element view and search for group:
VAL-10-0386-SCH APPROVAL AUTH4. Edit the dialog text and replace the text fields with your local TIU Data Objects. The text fields should be left for any dialog text for which no local TIU Data Objects exist on your system.

C. Using the Vista menu, reminder dialog manager, reminder dialogs, change view to group view and search for group:
VAL-GP VHA FORM 10-0386 LOCAL VHA INFO. Edit the dialog text and replace the text fields: {FLD:VA-10-0386 EDIT 40 REQ} and {FLD:VA-10-0386 WP 2 LINE} with your local facility information and any local patient TIU DATA Objects.

NOTE: If you require further technical assistance, 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: Enterprise Applications
Subcategory: Applications
Enterprise Application: VistA - Clinical Reminders
Assignment Group: NTL SUP Clin 2