Update 2_0_82

Clinical Reminders

VA-ADVANCE CARE PLANNING

Install Guide

July 2019

Product Development
Office of Information Technology
Department of Veterans Affairs
**Table of Contents**

**INTRODUCTION** .............................................................................................................. 1
**INSTALL DETAILS** ........................................................................................................ 4
**INSTALL EXAMPLE** ......................................................................................................... 4
**POST INSTALLATION** ....................................................................................................... 8
Introduction

Description:
The two dialog templates, included in this update, are only to be used for Advance Care Planning (ACP) via Group Visits (GV) which reflects an ACP Group conducted by trained facilitators utilizing information from the Veteran’s ACP Worksheet. Both documents are written in Clinical Reminder Dialog format to enable the extraction of health factors that will provide data for measurement of the impact of the ACP-GV process on the Veterans. This is a Diffusion of Excellence Program that was mandated by the Secretary of the VA. These dialog templates are mandatory for use by Advance Care Planning groups.

To date, no other CPRS templates reflect the information and data collected during the Advance Care Planning Group Discussion. It is necessary to effectively evaluate this national program and record individualized Veteran information for the continuity of care with the VA System.

Consistency in the documentation from one VA Facility to another, reducing the documentation time spent by clinicians and support staff, decreases the manual process of data collection and reporting data to the program office.

For more information, contact the Office of Social Work: Lisa M. Nabholz (lisa.nabholz@va.gov) and Jamie Jensen (jamie.jensen2@va.gov).

Two reminder dialogs are being distributed with this update:
VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)
VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)

UPDATE_2_0_82 contains 1 Reminder Exchange entry:
UPDATE_2_0_82 VA-ADVANCE CARE PLANNING

The exchange file contains the following components:

TIU TEMPLATE FIELD

WP 1 LINE
PLAN:
IC/BLANK LINE 74 CHARACTERS T DIALOG USE
ACP GV DOCUMENT
WORD 2 LINES RQ
WORDFLD_EDIT_50REQ
CHECK ALL THAT APPLY3
ACP-GV INDIVID
BLANK (1) SPACE
REQUIRED ANSWER
BLANK (2)
ACP-GV INSTRUCTIONS WORKSHEET
ACP-GV INTRO
HEALTH FACTORS
VA-REMINDER UPDATES
VA-UPDATE_2_0_82
VA-SOCIAL WORK ACP
VA-ACP GV F/U-NOT CONTIN
VA-ACP GV F/U-CONTINUE
VA-ACP GV F/U-NO GOALS
VA-ACP GV F/U-UNABLE
VA-ACP GV F/U-PART GOALS
VA-ACP GV F/U CALL-COMPLETE GOALS
VA-ACP GV F/U CALL DONE: CONTACTED VET
VA-ACP GV F/U CALL DONE: UNABLE TO CONT
VA-ACP GV F/U CALL DONE
VA-ACP GV SUPPORT PERSON: FRIEND
VA-ACP GV SUPPORT PERSON: TRUSTED OTHER
VA-ACP GV SUPPORT PERSON: GRANDCHILD
VA-ACP GV SUPPORT PERSON: GRANDPARENT
VA-ACP GV SUPPORT PERSON: SIBLING
VA-ACP GV SUPPORT PERSON: PARENT
VA-ACP GV SUPPORT PERSON: ADULT CHILD
VA-ACP GV SUPPORT PERSON: SPOUSE
VA-ACP GV SUPPORT PERSON: NONE
VA-ACP GV ATTEND INDIVIDUAL
VA-ACP GV ATTEND CREATED BY STAFF
VA-ACP GV ATTEND ESTABLISHED GROUP
VA-ACP GV ATTEND VA-VIRTUAL MED CENTER
VA-ACP GV ATTEND TELEHEALTH
VA-ACP GV ATTEND IN PERSON
VA-ACP GV POST Q11-NOT ANSWERED
VA-ACP GV POST Q11-DEFINITELY WILL
VA-ACP GV POST Q11-PROBABLY WILL
VA-ACP GV POST Q11-NOT SURE
VA-ACP GV POST Q11-PROBABLY WILL NOT
VA-ACP GV POST Q11-DEFINITELY WILL NOT
VA-ACP GV POST Q9-NOT ANSWERED
VA-ACP GV POST Q9-OTHER
VA-ACP GV POST Q9-NEED TIME TO THINK
VA-ACP GV POST Q9-UPDATE ADV DIR
VA-ACP GV POST Q9-LEARN
VA-ACP GV POST Q9-UNCLEAR GOALS
VA-ACP GV POST Q9-FILE COPY
VA-ACP GV POST Q9-NON-FAMILY
VA-ACP GV POST Q9-HEALTHCARE PROVIDER
VA-ACP GV POST Q9-FAMILY TALK
VA-ACP GV POST Q9-COMPLETE
VA-ACP GV POST Q9-CHECK CURRENT ADV DIR
VA-ACP GV POST Q8-KNOWLEDGE/NOT ANSWERED
VA-ACP GV POST Q8-KNOWLEDGE/EXTREMELY
VA-ACP GV POST Q8-KNOWLEDGE/QUITE A BIT
VA-ACP GV POST Q8-KNOWLEDGE/MODERATELY
VA-ACP GV POST Q8-KNOWLEDGE/A LITTLE BIT
VA-ACP GV POST Q8-KNOWLEDGE/NOT AT ALL
VA-ACP GV PRE Q7-NOT ANSWERED
VA-ACP GV PRE Q7-NO
VA-ACP GV PRE Q7-YES
VA-ACP GV PRE Q6-NOT ANSWERED
VA-ACP GV PRE Q6-NO
VA-ACP GV PRE Q6-YES
VA-ACP GV PRE Q5-NOT ANSWERED
VA-ACP GV PRE Q5-NO
VA-ACP GV PRE Q5-YES
VA-ACP GV PRE Q4-NOT ANSWERED
VA-ACP GV PRE Q4-NO
VA-ACP GV PRE Q4-YES
VA-ACP GV PRE Q3-NOT ANSWERED
VA-ACP GV PRE Q3-NO
VA-ACP GV PRE Q3-YES
VA-ACP GV PRE Q2-NOT ANSWERED
VA-ACP GV PRE Q2-NO
VA-ACP GV PRE Q2-YES
VA-ACP GV PRE Q1-NOT ANSWERED
VA-ACP GV PRE Q1-KNOWLEDGE/QUITE A BIT
VA-ACP GV PRE Q1-KNOWLEDGE/EXTREMELY
VA-ACP GV PRE Q1-KNOWLEDGE/MODERATELY
VA-ACP GV PRE Q1-KNOWLEDGE/A LITTLE BIT
VA-ACP GV PRE Q1-KNOWLEDGE/NOT AT ALL
VA-ACP GV DONE

REMINDER SPONSOR
OFFICE OF SOCIAL WORK

REMINDER TERM
VA-REMINDER UPDATE_2_0_82

REMINDER DIALOG
VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)
VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)

HEALTH SUMMARY TYPE
None
HEALTH SUMMARY OBJECTS
None

TIU DOCUMENT DEFINITION
None

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_82.PRD

The file will be installed using Reminder Exchange, programmer access is not required. The total time for installation should be less than 15 minutes.

Install Example

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

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_82.PRD

http://vista.med.va.gov/reminders/UPDATE_2_0_82.PRD successfully loaded.

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_82 VA-ADVANCE CARE PLANNING** in reminder exchange

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry. Enter the number that corresponds with your entry titled **UPDATE_2_0_82 VA-ADVANCE CARE PLANNING** (in this example it is entry 143 it will vary by site)

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 any existing components, choose **S to Skip**
**DIALOG #1:**
You will be prompted to install the **VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)** reminder dialog component:

```
At the Select Action prompt, type IA to install the dialog – VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD) Select Action: Next Screen// IA  Install All
Install reminder dialog and all components with no further changes: Y// Yes
```

When the dialog has completed installation, you will then be returned to this screen. At the Select Action prompt, type Q.
**DIALOG #2:**
You will then be prompted to install the **VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** reminder dialog component:

<table>
<thead>
<tr>
<th>#</th>
<th>Description</th>
<th>Type</th>
<th>Exists</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)</td>
<td>dialog</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>VA-SOC WORK ACP GV NOTE VERSION</td>
<td>element</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>VA-GP SOC WORK ADVANCE CARE PLANNING (ACP) GROUP VISIT (GV)</td>
<td>group</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finding: VA-ACP GV DONE (HEALTH FACTOR)</td>
<td>group</td>
<td>X</td>
</tr>
<tr>
<td>4</td>
<td>BLANK LINE</td>
<td>group</td>
<td>X</td>
</tr>
<tr>
<td>5</td>
<td>10 VA-GP SOC WORK ACP GV VISIT TYPE</td>
<td>group</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finding: <em>NONE</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>10.10 VA-SOC WORK ACP GV ATTEND IN PERSON</td>
<td>element</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finding: VA-ACP GV ATTEND IN PERSON (HEALTH FACTOR)</td>
<td>element</td>
<td>X</td>
</tr>
</tbody>
</table>

At the **Select Action** prompt, type **IA** to install the dialog – **VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** Select Action: Next Screen// **IA** Install All
Install reminder dialog and all components with no further changes: **Y// Yes**

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

Install complete

## Post Installation

1. **Make the Dialogs 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:

   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: **?**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>148</td>
<td>VA-VETERANS CHOICE NOTE</td>
</tr>
<tr>
<td>149</td>
<td>VA-TBI SCREENING</td>
</tr>
</tbody>
</table>
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-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD)** then **<enter>** reminder dialog NATIONAL
OK? Yes// **<Enter>** (Yes)

**NOTE**: REPEAT THESE SAME STEPS to create a sequence for:
**VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD)** then **<enter>** reminder dialog NATIONAL
OK? Yes// **<Enter>** (Yes)

2. Add the dialogs to Shared Templates in CPRS.

Open the Template Editor and from Shared Templates, select “Shared Templates”

Click the ‘triangle’ to left of Shared Templated to expand. Select the folder(s) where the templates will be located.

**Suggestion**: Multiple disciplines/services may be accessing these templates. It is suggested to add these templates to a single folder for Advance Care Planning or to multiple service folders (i.e. Nursing, Social Work, Primary Care, Chaplain, Palliative Care, and/or Mental Health).

Click the New Template button
- Type VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT in the Name box
- Click the down arrow and Click on Reminder Dialog in the Template Type Box
- Type VA-SOC WORK ADVANCE CARE PLANNING GROUP VISIT (CRD) in the Reminder Dialog box
- Click Apply in lower right corner
Repeat these steps to add the 2nd template:

Click the New Template button
- Type VA-SOC WORK ADVANCE CARE PLANNING GV-F/U in the Name box
- Click the down arrow and Click on Reminder Dialog in the Template Type Box
- Type VA-SOC WORK ADVANCE CARE PLANNING GV-F/U (CRD) in the Reminder Dialog box
- Click Apply in lower right corner

Test the shared templates in CPRS to confirm the template is attached.
3. Notify your Advance Care planning POC to request the creation of a Clinic build.

Contact your local POC for Advance Care planning and provide the link and directions below:

- A new clinic/s in needed per the instructions on the VA Pulse Page
- The VA Pulse link to the Clinic Build instructions is > ACP-GV Pulse
  - Refer to the Getting Started Folder / Building your clinic

**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