USH LEGAL SOLUTION –
CATEGORY I Patient Record Flag (PRF)

Installation Guide

DG*5.3*864
TIU*1*275
GMTS*2.7*103

August 2013

Department of Veterans Affairs
Office of Information (OI)
Product Development

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1. Introduction

Patches TIU*1.0*275, DG*5.3*864, and GMTS*2.7*103 address the Under Secretary of Health's (USH) legal solution to provide a new national Category I patient record flag that will inform all Veteran Health Administration (VHA) caregivers of special guidelines that must be followed when documenting notes or dealing with a specific patient. This flag will require special permissions in order to be assigned to a patient and, once assigned, it cannot be modified or inactivated other than allowing the reassignment of the owning facility.

This new Patient Record Flag project consists of a build containing three patches, as described below.

- **Patch TIU*1*275** installs one new Progress Note Title into the TIU DOCUMENT DEFINITION file (8925.1): PATIENT RECORD FLAG CATEGORY I – URGENT ADDRESS AS FEMALE. The patch installation links the title to the existing document class, PATIENT RECORD FLAG CAT I. This title will be automatically linked to the URGENT   ADDRESS AS FEMALE Patient Record Flag during the install of DG*5.3*864.

- **Patch DG*5.3*864** installs a new national Category I patient record flag: URGENT ADDRESS AS FEMALE PRF and associates the new PATIENT RECORD FLAG CATEGORY I – URGENT   ADDRESS AS FEMALE progress note title with the new flag. This Patient Record Flag was established to ensure that a transgender Veteran is addressed as Female per a court order agreement. This flag cannot be used without approval of the Under Secretary for Health.

    The ability to assign the new URGENT   ADDRESS AS FEMALE PRF will be limited to one identified IRM staff member with programmer access, or an identified clinician with temporary programmer access assigned by IRM staff at one pre-determined site. The identified person with programmer access at the pre-determined site will assign the URGENT   ADDRESS AS FEMALE PRF to a pre-determined patient, identified by UnderSecretary of Health (USH). The text used during the assignment will be based on very specific pre-defined text provided by the Office of the Under Secretary of Health.

    Once the USH specified patient is assigned the URGENT   ADDRESS AS FEMALE flag, the PRF cannot be inactivated for the patient. NOTE: Only one site will be assigning this flag to the patient. There will be no Review frequency for this flag assignment.

    The patch also includes a change to the Register a Patient [DG REGISTER PATIENT] option and the Load/Edit Patient Data [DG LOAD PATIENT DATA] option to ensure Category I Patient Record Flags are updated when a patient registers at a new facility. The updates are provided from the existing VistA treating facility where the patient has been seen. This change is required to address a Patient Safety Issue (PSPO #2365) and Remedy Ticket #801785 – Category I Flag.

```
Patient Safety Issues (PSIs)
---------------------------
PSPO #2365 - During testing of new software it was found when a patient
registers at a new facility the backward look-up to determine if a
Category I Record Flag exists for that patient at any other facility does
not function correctly.
```

- **Patch GMTS*2.7*103** provides two new Health Summary Types: VA-PT RECORD FLAG
  STATUS for local display of active and inactive patient record flags and REMOTE PT
  RECORD FLAG STATUS for use from Remote Data Views to see another treating facilities
  active and inactive patient record flags. Both of these Health Summary Types include a new
  Health Summary Component, CAT I PT RECORD FLAG STATUS, that displays the active
  and inactive Category I Patient Record Flags assigned to a given patient.

```
HEALTH SUMMARY TYPE (#142)

NAME: VA-PT RECORD FLAG STATUS
 LOCK: GMTSMGR
 SUMMARY ORDER: 5
   COMPONENT NAME: CAT I PT RECORD FLAG STATUS
 NATIONALLY EXPORTED TYPE: Nationally Exported, Uneditable

 NAME: REMOTE PT RECORD FLAG STATUS
 LOCK: GMTSMGR
 SUMMARY ORDER: 5
   COMPONENT NAME: CAT I PT RECORD FLAG STATUS
  NATIONALLY EXPORTED TYPE: Nationally Exported, Uneditable

HEALTH SUMMARY COMPONENT (#142.1)

 NUMBER: 257                         NAME: CAT I PT RECORD FLAG STATUS
 PRINT ROUTINE: EN;GMTSRFHX          ABBREVIATION: PRF1
 DESCRIPTION:   This component displays the Active and Inactive Category 1
 Patient Record Flags assigned to a given patient.  The full assignment
 history is included with each instance of flag assignment.  Active flag
 assignments are displayed first, followed by Inactive flag assignments.
```

NOTE: MPIF*1*58, a related patch, is not part of the bundle described in this Install Guide, but
will need to be installed concurrently. A code change has been made in routine MPIFBT3 to
support the Patient Record Flag initiative distributed in VistA patch DG*5.3*864.

For some time the Register a Patient [DG REGISTER PATIENT] and Load/Edit Patient Data
[DG LOAD PATIENT DATA] options have included the query for the Patient Record
Flag. However, when a patient is created outside of these options, the query for the Patient
Record Flag was not occurring.

Also, if a patient does not get an Integration Control Number (ICN) via the direct connect to the
Master Veteran Index during registration, that record gets a local ICN. The local ICN is resolved
to a national ICN through the Local/Missing ICN Resolution Background Job [MPIF LOC/MIS
 ICN RES] option.

The Local/Missing ICN Resolution Background Job [MPIF LOC/MIS ICN RES] now includes the query for the Patient Record Flag once the ICN has been returned to VistA and the patient is shared with another VAMC.

> **NOTE: After all sites have completed the install, one site will be instructed, by the Office of Under Secretary for Health, to add the URGENT   ADDRESS AS FEMALE flag for a specified patient.** Any site that has treated this patient will be updated automatically by the patient record flag software after the flag is added for the patient. New sites registering the patient will either be updated during the Registration process or by the Master Patient Index process that updates the patient's national ICN and treating facility list.

Remedy Ticket
 INC000000801785 - Category I Flag
The automatic update (a routine unseen by users) of the Category I Flag to the new facility, the patient is registering at does not work correctly. Corrections will be made to the Patient Record Flag routines, addressed in patch DG*5.3*864.

Test Sites:
 Biloxi VAMC
 Loma Linda VAMC
 Puget Sound HCS
 Portland VAMC

2. Pre-Installation

2.1. Add members to the DGPF HL7 TRANSMISSION ERRORS Mail Group

The Mail Group Coordinator for the DGPF HL7 TRANSMISSION ERRORS Mail Group will need to add members to this Mail Group. It is recommended that this flag be assigned to IRM staff (installing this software), Clinical Application Coordinator for Patient Record Flag software, HIMS flag coordinator(s)/representative and Suicide Prevention Coordinator(s)/ representment as members.

Due to the logic change in registration and load/edit of patient data, there will be an increase in the amount of messaging that will occur between sites to update the Category I flags for a newly registered patient at your site.

2.2. Check local versus national conflict for HEALTH SUMMARY COMPONENT file (#142.1) entries

Prior to installing the patch, examine the HEALTH SUMMARY COMPONENT file (#142.1) for any NUMBER (.001), NAME (.01), or ABBREVIATION (3) entries that will conflict with the new component exported with this patch. The national component NUMBER, NAME, and ABBREVIATION are as follows:

```
NUMBER (IEN)            NAME                            ABBREVIATION
257                     CAT I PT RECORD FLAG STATUS     PRF1
```

Internal Entry Numbers below 100001 are reserved for National health summary components. It is extremely unlikely that your site will have a component stored at IEN 257, as doing so would require programmer access and manual editing of the ^GMR(142.1 global. To check the global on your system, look at ^GMT(142.1,257. That location should be empty. If not, your site will need to submit a Remedy ticket for Health Summary support to assist in cleaning up that global entry. Before submitting the ticket, if the component is actually in use at your site and should be kept, it can be recreated as a local IEN and with a slightly different name. Use the "Create/Modify Health Summary Components" option of the GMTS IRM MAINTENANCE MENU to recreate the component. After recreating the component, submit the Remedy ticket requesting Health Summary support with: locating any items pointing to IEN 257, have those items re-pointed to the new local component location, and cleaning up the unwanted entry at IEN 257.

The "B" cross-reference for the HEALTH SUMMARY COMPONENT file (#142.1), [^GMR(142.1,"B",], contains the NAME for each component. Each component entry in the file must have a unique NAME. Examine the global listing for this cross-reference to determine if any local component will need the NAME field edited to avoid collision with the new national component.

^GMT(142.1,"B","CAT I PT RECORD FLAG STATUS",660187)="" <-Example of a local component that will conflict with the incoming CAT I PT RECORD FLAG STATUS component NAME.

The "C" cross-reference for the HEALTH SUMMARY COMPONENT file (#142.1), [^GMR(142.1,"C",], contains the ABBREVIATION for each component. Each component entry in the file must have a unique ABBREVIATION. Examine the global listing for this cross-reference to determine if any local components will need the ABBREVATION field edited to avoid collision with the new national component.

^GMT(142.1,"C","PRF1",660187="" <-Example of a local component that will conflict with the incoming CAT I PT RECORD FLAG STATUS component ABBREVIATION.

If a NAME or ABBREVIATION conflict is found, the "Create/Modify Health Summary Components" option of the GMTS IRM MAINTENANCE MENU should be used to edit the local component's NAME or ABBREVIATION.

*Required Software for DG*5.3*864*

Package/Patch	Namespace	Version	Comments
Health Summary	GMTS	2.7	Fully patched
Kernel	XU	8.0	Fully patched
Registration/Patient Record Flag	DG	5.3	Fully patched
VA FileMan	DI	22	Fully patched
Master Patient Index Veteran	MPIF	1	MPIF*1*58

Related Documentation

Documentation	Documentation File name
USH LEGAL SOLUTION – CATEGORY I Patient Record Flag (PRF) Installation Guide	DG_5.3_864_IG.PDF
USH LEGAL SOLUTION – CATEGORY I Patient Record Flag (PRF) Release Notes	DG_5.3_864_RN.PDF
Patient Record Flag (PRF) User Guide	PatRecFlagUG.PDF
Health Summary User Manual	HSUM2_7_103_UM.PDF
Health Summary Technical Manual	HSUM2_7_103_TM.PDF
TIU User Manual	TIUUM-275.PDF

3. Installation

This patch can be installed with users on the system, but it should be done during non-peak hours. **Estimated Installation Time: 10-15 minutes**

The installation needs to be done by a person with DUZ (0) set to "@."

3.1. Retrieve the host file from one of the following locations (with the ASCII file type):

Albany	ftp.fo-albany.med.va.gov	<ftp://ftp.fo-albany.med.va.gov>
Hines	ftp.fo-hines.med.va.gov	<ftp://ftp.fo-hines.med.va.gov>
Salt Lake City	ftp.fo-slc.med.va.gov	<ftp://ftp.fo-slc.med.va.gov>

The name of the host file is USH_PRF_LEGAL_SOLUTION_1_0.KID.

3.2. Install the patch first in a training or test account.

Installing in a non-production environment will give you time to get familiar with new restrictions on entering the new URGENT   ADDRESS AS FEMALE flag using the DGPF RECORD FLAG MANAGEMENT and DGPF FLAG ASSIGNMENT options. ***Once in production, only one site will actually be tasked to assign the new flag to one specific patient.*** There will be no impact on patient record flag functionality for other Category I flags.

3.3. Load the distribution.

In programmer mode, type, D ^XUP, select the Kernel Installation & Distribution System menu (XPD MAIN), then the Installation option, and then the option LOAD a Distribution. Enter your directory name.KID at the Host File prompt.

Example

```
Select Installation Option: LOAD a Distribution
Enter a Host File: DIR$:[LOCALDIR]USH PRF LEGAL SOLUTION 1.0.KID
KIDS Distribution saved on
```

From the Installation menu, you may elect to use the following options:

a. *Backup a Transport Global*
This option will create a backup message of any routines exported with the patch. It will NOT back up any other changes such as DDs or templates.

b. *Compare Transport Global to Current System*

This option will allow you to view all changes that will be made when the patch is installed. It compares all components of the patch (routines, DDs, templates, etc.).

c. *Verify Checksums in Transport Global*

This option will allow you to ensure the integrity of the routines that are in the transport global. If there are any discrepancies, do not run the Install Package(s) option. Instead, run the Unload a Distribution option to remove the Transport Global from your system. Retrieve the file again from the anonymous directory (in case there was corruption in Ftp'ing) and Load the Distribution again. If the problem still exists, log a Remedy ticket and/or call the national Help Desk (1-888-596-HELP) to report the problem.

```
Select INSTALL NAME: USH PRF LEGAL SOLUTION 1.0

Want each Routine Listed with Checksums: Yes//   YES
DEVICE: HOME//   VIRTUAL TELNET
-------------------------------------------------------------------------------

TIUPS275  Calculated    9548345

   1 Routine checked, 0 failed.

PACKAGE: DG*5.3*864     Aug 27, 2013 9:17 am                          PAGE 1
-------------------------------------------------------------------------------

DG10      Calculated   19615369
DG53864P  Calculated    6717089
DGPFLMA2  Calculated   58607996
DGPFMPI   Calculated    2049737
DGREG     Calculated   47583853

   6 Routines checked, 0 failed.

PACKAGE: GMTS*2.7*103     Aug 27, 2013 9:17 am                        PAGE 1
-------------------------------------------------------------------------------

GMTSRFHX  Calculated   19895758
GMTSY103  Calculated   35203734

   2 Routines checked, 0 failed.
```

3.4. Install the Build.

From the Installation menu on the Kernel Installation and Distribution System (KIDS) menu, run the option Install Package(s). Select the build PXRM*2.0*27 **and** proceed with the install. If you have problems with the installation, log a Remedy ticket and/or call the National Help Desk to report the problem.

```
Select Installation & Distribution System Option: Installation
Select Installation Option: INSTALL PACKAGE(S)
Select INSTALL NAME: DIR$:[LOCALDIR]USH PRF LEGAL SOLUTION 1.0
```

Answer "NO" to the following prompt:

```
Want KIDS to INHIBIT LOGONs during install? NO// NO
```

NOTE: DO NOT QUEUE THE INSTALLATION, because this installation asks questions requiring responses and queuing will stop the installation. A Clinical Application Coordinator (CAC) should be present to respond to these.

Installation Example: See Appendix A.

3.5. Install File Print

Use the KIDS Install File Print option to print out the results of the installation process. You can select the multi-package build or any of the individual builds included in the multi-package build.

```
Select Utilities Option: Install File Print
Select INSTALL NAME: DIR$:[LOCALDIR]USH PRF LEGAL SOLUTION 1.0
```

3.6. Build File Print

Use the KIDS Build File Print option to print out the build components.

```
Select Utilities Option:  Build File Print
Select BUILD NAME: USH PRF LEGAL SOLUTION 1.0
DEVICE: HOME//
```

3.7. Post-installation routines

A post-installation routine for the DG*5.3*864 patch loads the "URGENT   ADDRESS AS FEMALE" patient record file entry into the PRF National Flag file (#26.15). This post-init routine will update the flag's TIU PN TITLE field with the new "PATIENT FLAG CATEGORY I - URGENT   ADDRESS AS FEMALE" TIU Document Definition. Note: The TIU*1.0*275 patch installed this new TIU PN TITLE, before the DG*5.3*864 patch install.

GMTS*2.7*103 Pre and Post-Routines

GMTS*2.7*103 runs an environment check routine to ensure that IEN 257 in ^GMT(142.1 is unused and will also check for any NAME (.01) or ABBREVIATION (3) conflicts with the new component. If any conflicts are found, the environment check will indicate the conflict, the install will abort, and the transport global will be unloaded from the system.

 The pre-install routine will remove any previous version of the Reminder Exchange file that is used to install the two new Health Summary Types. In the event of multiple installations, this step ensures that the Reminder Exchange file used during installation is from the build instead of the version stored in the REMINDER EXCHANGE file (#811.9).

The post-install routine will install the Health Summary Component into the HEALTH SUMMARY COMPONENT file (#142.1). This routine will also initiate the Reminder Exchange installation for the Health Summary Types.

Once the post-install is completed the post-init routines can be deleted.

4. Post-Install Set-up Instructions

After installing the USH PRF LEGAL SOLUTION 1.0 bundle and the MPIF*1.0*58 patch, the following post-install set-up steps should be followed. Note: Recommended role

4.1. Check for errors and monitor PRF HL7 messaging for increase in activity.

IRM should check for any errors in error logs. Note: During the post-installation process, for every Category I flag owned on your VA system, there will be HL7 update messages sent to each treating facility that sees the patient with the Category I flag. Use the PRF HL7 Messaging tools to monitor the increase in activity.

4.2. Verify that the new URGENT   ADDRESS AS FEMALE Category I flag was added to the National Flag List.

Review the definition of the URGENT   ADDRESS AS FEMALE Category I flag to be familiar with how it will be used – extremely limited use.

```
DGPF RECORD FLAG MANAGEMENT     Record Flag Management     run
routine
Record Flag Management
...EXCUSE ME, HOLD ON...
```

```
RECORD FLAG MANAGEMENT    Jul 22, 2013@11:19:19    Page:   1 of   1
Flag Category: I (National)                    Sorted By: Flag Name

    Flag Name                     Flag Type          Flag Status
1   BEHAVIORAL                    BEHAVIORAL             ACTIVE
2   HIGH RISK FOR SUICIDE         CLINICAL               ACTIVE
3   URGENT    ADDRESS AS FEMALE   OTHER                  ACTIVE



          Enter ?? for more actions
          Enter ?? for more actions
CC  Change Category     DF  Display Flag Detail  EF  (Edit Record Flag)
CS  Change Sort         AF  (Add New Record Flag)
Select Action:Quit//
```

Use DF (Display Flag Action) to see the flag definition.

```
RECORD FLAG MANAGEMENT    Jul 22, 2013@11:19:19    Page:   1 of   1
Flag Category: I (National)                    Sorted By: Flag Name

    Flag Name                     Flag Type          Flag Status
1   BEHAVIORAL                    BEHAVIORAL             ACTIVE
2   HIGH RISK FOR SUICIDE         CLINICAL               ACTIVE
3   URGENT    ADDRESS AS FEMALE   OTHER                  ACTIVE



          Enter ?? for more actions
CC  Change Category     DF  Display Flag Detail  EF  (Edit Record Flag)
CS  Change Sort         AF  (Add New Record Flag)
```

```
Select Action:Quit// DF   Display Flag Detail
Select Record Flag:  (1-3): 3
...SORRY, THIS MAY TAKE A FEW MOMENTS...
```

```
FLAG DETAILS               Jul 22, 2013@11:23:47      Page:   1 of   1
Flag Name: URGENT   ADDRESS AS FEMALE            Flag Status: ACTIVE

            Flag Name: URGENT    ADDRESS AS FEMALE
        Flag Category: I (NATIONAL)
            Flag Type: OTHER
          Flag Status: ACTIVE
     Review Freq Days: 0    <Notice no Review Freq for this flag - so no
Review Date>
    Notification Days: 0
    Review Mail Group:  <No Review Mail Group because no Review Freq>
Progress Note Title: PATIENT RECORD FLAG CATEGORY I - URGENT     ADDRESS
AS FEMAL
<Note the Progress Note Title to be used with this flag.>
Flag Description:
-----------------
This Patient Record Flag was established to ensure that a transgender
Veteran is addressed as Female per a court order agreement. This flag
cannot be used without approval of the Under Secretary for Health.

<Note the specific use for this flag>

           Enter ?? for more actions

Select Action:Quit//
```

4.3. Verify that the TIU Document Definition for the new Progress Note Title was added by the TIU*1.0*275 patch.

The example below is based on using FileMan Inquiry.

```
Select OPTION: INQUIRE TO FILE ENTRIES

OUTPUT FROM WHAT FILE: HEALTH SUMMARY COMPONENT// TIU DOCUMENT
     1    TIU DOCUMENT                      (10917 entries)
     2    TIU DOCUMENT DEFINITION           (647 entries)
     3    TIU DOCUMENT PARAMETERS           (34 entries)
CHOOSE 1-3: 2   TIU DOCUMENT DEFINITION    (647 entries)
Select TIU DOCUMENT DEFINITION NAME: PATIENT RECORD FLAG
     1    PATIENT RECORD FLAG CAT I        DOCUMENT CLASS
     2    PATIENT RECORD FLAG CAT II       DOCUMENT CLASS
     3    PATIENT RECORD FLAG CATEGORY I        TITLE
     4    PATIENT RECORD FLAG CATEGORY I - HIGH RISK FOR SUICIDE    TITLE
      Std Title: MENTAL HEALTH PATIENT RECORD FLAG
     5    PATIENT RECORD FLAG CATEGORY I - URGENT    ADDRESS AS FEMALE
TITLE
      Std Title: PATIENT RECORD FLAG
Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5: 5   PATIENT RECORD FLAG CATEGORY I - URGENT    ADDRESS AS FEMALE
TITLE
      Std Title: PATIENT RECORD FLAG
```

```
ANOTHER ONE:
STANDARD CAPTIONED OUTPUT? Yes//    (Yes)
Include COMPUTED fields:  (N/Y/R/B): NO//  - No record number (IEN), no
Computed
 Fields
DISPLAY AUDIT TRAIL? No//    NO


NAME: PATIENT RECORD FLAG CATEGORY I - URGENT     ADDRESS AS FEMALE
  PRINT NAME: PATIENT RECORD FLAG CATEGORY I - URGENT     ADDRESS AS FEMALE
  TYPE: TITLE                          CLASS OWNER: CLINICAL COORDINATOR
  STATUS: ACTIVE                       NATIONAL STANDARD: YES
  OK TO DISTRIBUTE: YES
  VHA ENTERPRISE STANDARD TITLE: PATIENT RECORD FLAG
  MAP ATTEMPTED: JUL 19, 2013@08:17:13  MAP ATTEMPTED BY: CRCAC,TWO
  TIMESTAMP: 63022,29833
```

4.4. Assign Clinician to the new DGPF PATIENT RECORD FLAGS MGR User Class

a. To write a PRF note for a category I flag, the user must belong to the DGPF PATIENT RECORD FLAG MGR user class using the USR CLASS MANAGEMENT MENU. Each site will be responsible for populating this user class.

b. One clinician at one VA site (Biloxi) will be creating the progress note associated with the new URGENT   ADDRESS AS FEMALE assignment for one patient. IRM staff or CAC must make sure this one clinician is added to the DGPF PATIENT RECORD FLAGS MGR User Class.

c. The new **"PATIENT FLAG CATEGORY I - URGENT   ADDRESS AS FEMALE"** TIU Document Definition title is in the existing Document Class PATIENT RECORD FLAG CAT I, and the existing business rule applies to that Document Class**,** so the rule applies to the new title automatically.

Business Rule:
```
An UNTRANSCRIBED (DOCUMENT CLASS) PATIENT RECORD FLAG CAT I may
BE ENTERED by a DGPF PATIENT RECORD FLAGS MGR

 DESCRIPTION: This rule limits note entry to persons specially trained to
assign and document the assignment of Category I Patient Record Flags.
Sites must not alter, delete, or override this rule. Rule created by patch
USR*1*24.
```

Example of USR CLASS MANAGEMENT for current Category I TIU Standard Note Title:

```
Select OPTION NAME: USR
    1   USR BUSINESS RULE MANAGEMENT       Manage Business Rules      action
    2   USR CLASS DEFINITION      User Class Definition      action
    3   USR CLASS MANAGEMENT MENU       User Class Management     menu
    4   USR INITIALIZE MEMBERSHIP    Initialize Membership of User
Classes action
    5   USR LIST MEMBERSHIP BY CLASS        List Membership by Class     action
Press <RETURN> to see more, '^' to exit this list, OR
CHOOSE 1-5: 2 USR CLASS DEFINITION    User Class Definition     action
User Class Definition
```

```
Select User Class Status: ACTIVE//    Active
        Start With Class: FIRST//
            Go To Class: LAST//
Searching for the User
Classes.................................................
```

```
User Classes                    Oct 30, 2012@09:04:33     Page:    9 of   42
                            ACTIVE USER CLASSES                    622 Classes
+    Class Name                                      Abbrev
121  DERMATOLOGIST: CLINICAL & LABORATORY            DERM
122  DERMATOLOGY FELLOW                              DERM
123  DERMATOPATHOLOGIST                              DERMP
124  DETECTIVE                                       DET
125  DEVELOPER                                       DEV
126  DGPF PATIENT RECORD FLAGS MGR                   PRFM
127  DIABETES STUDY NURSE                            DSRN

128  DIALYSIS TECHNICIAN                             DIALTEC
129  DIETETIC INTERN                                 DI
130  DIETETIC TECHNICIAN STUDENT                     DTS
+          + Next Screen  - Prev Screen  ?? More Actions
        Find                    Expand/Collapse Class    Change View
        Create a Class          List Members             Quit
        Edit User Class
Select Action: Next Screen// 126
Listing Members of #126
```

```
User Class Members              Oct 30, 2012@09:05:11     Page:    1 of    1
                        DGPF PATIENT RECORD FLAGS MGRs             5 Members
     Member                                          Effective  Expires
1    MHPROVIDER,THREE
2    MHPROVIDER,TWELVE                               10/18/11
3    MHPROVIDER,TEN
4    MHPROVIDER,TWO                                  10/18/11
5    WHPROVIDER,THIRTEEN
          (?SBPN) missing SIGNATURE BLOCK PRINTED NAME                  >>>
        Add                     Remove                  Change View
        Edit                    Schedule Changes        Quit
Select Action: Quit// AD   Add
Select MEMBER: MHPROVIDER, TWENTY        TM        CAC MD
MEMBER: MHPROVIDER, TWENTY//
EFFECTIVE DATE: NOW  (OCT 30, 2012)
EXPIRATION DATE:
```
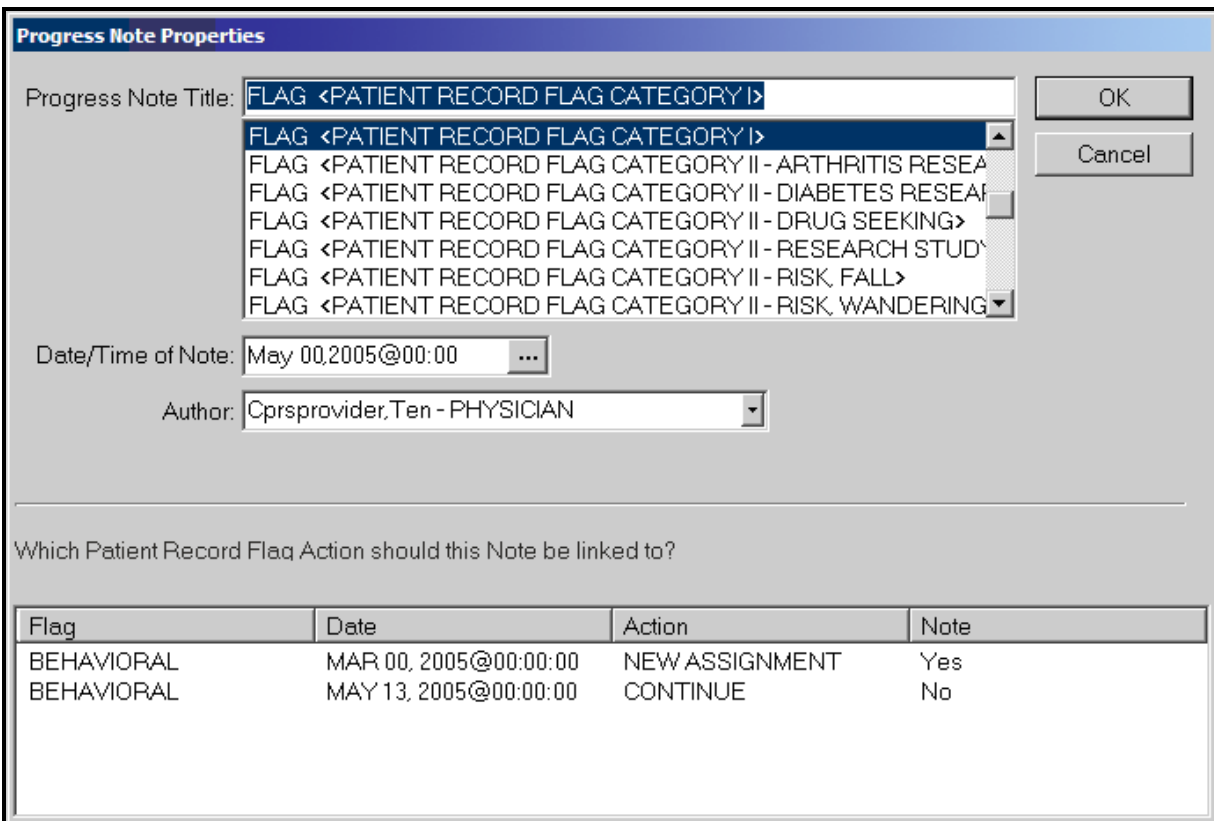
4.5. Clinician's note linked to NEW ASSIGNMENT action after assignment.

Linking PRF Notes to Flag Actions

The only actions that will be available to link a note to for the URGENT   ADDRESS AS
FEMALE flag will be the NEW ASSIGNMENT action. The only other action that can be
taken for the URGENT   ADDRESS AS FEMALE flag is the change owner site action,
which can only be done at the site that owns this flag.

In the CPRS GUI, users must link a PRF progress note to a flag action when the user writes a
PRF note. This linking can also be done through the List Manager interface using TIU
options. In the CPRS GUI's Progress Note Properties dialog, when a user selects a Patient

Record Flag progress note title, CPRS displays a list of flag actions to which the note can be linked at the bottom of the dialog. This list shows all the actions for the flag and whether each action has been linked.

For progress note titles that document the justification for a patient record flag, users will be able to link the progress note to the specific flag action they are documenting. The example shown here is of a Category I PRF progress note and the Continue action to which the user would choose to link.

4.6. Add Health Summary Types to the list of available reports in CPRS.

The two new Health Summary Types, VA-PT RECORD FLAG STATUS and REMOTE PT RECORD FLAG STATUS must be added to the list of available reports viewable in CPRS GUI. This can be done in different ways and from several different menus. Depending on local configuration, all health summary types may be available for selection or the selection may be configured to a defined list. See "Health Summary Configuration" in the Reports section of the CPRS Technical Manual: GUI Version for further information. Always follow your site's local policies on how to assign these items to the list of available reports. Any users with a CPRS session open during the time of installation will need to close and re-open CPRS in order to see the new Health Summary Types on the Reports tab.

This example uses the Health Summary Coordinator's menu [GMTS COORDINATOR] to add the items for use at the System level.

```
 GMTS COORDINATOR        Health Summary Coordinator's Menu      menu

    1        Print Health Summary Menu ...
    2        Build Health Summary Type Menu ...
    3        Set-up Batch Print Locations
    4        List Batch Health Summary Locations
    5        CPRS Reports Tab 'Health Summary Types List' Menu ...


 Select Health Summary Coordinator's Menu <TEST ACCOUNT> Option: 5  CPRS
Reports Tab 'Health Summary Types List' Menu


    1        Display 'Health Summary Types List' Defaults
    2        Precedence of 'Health Summary Types List'
    3        Method of compiling 'Health Summary Types List'
    4        Edit 'Health Summary Types List' Parameters


 Select CPRS Reports Tab 'Health Summary Types List' Menu <TEST ACCOUNT>
 Option:4  Edit 'Health Summary Types List' Parameters


 Allowable Health Summary Types may be set for the following:

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

 Enter selection: 4  System   DVF.FO-SLC.MED.VA.GOV

 - Setting Allowable Health Summary Types  for System:
 DVF.FO-SLC.MED.VA.GOV -
 Select Sequence: ?


 Sequence  Value
 --------  -----
 1         GMTS HS ADHOC OPTION
 2         GEC/LOCAL TEST
 7         VA-MH HIGH RISK PATIENT
 20        REMOTE MH HIGH RISK PATIENT


 Select Sequence: 15
 Are you adding 15 as a new Sequence? Yes//   YES

 Sequence: 15//    15
 Health Summary: VA-PT RECORD FLAG STATUS
 Select Sequence: 25
 Are you adding 25 as a new Sequence? Yes//   YES

 Sequence: 25//    25
 Health Summary: REMOTE PT RECORD FLAG STATUS
```

4.8 ONE SITE ONLY: Add flag for patient.

After all sites have completed the install – one site will be instructed, by the Office of Under Secretary for Health, to add the URGENT   ADDRESS AS FEMALE flag for a specified patient. Any site that has treated this patient will be updated automatically by the patient record flag software after the flag is added for the patient. New sites registering the patient will either be updated during the Registration process or by the Master Patient Index process that updates the patient's national ICN and treating facility list.

Appendix A: Installation Capture

```
Select INSTALL NAME: USH PRF LEGAL SOLUTION 1.0      8/27/13@08:46:44
     => USH PRF LEGAL SOLUTION 1.0  ;Created on Aug 27, 2013@08:45:32

This Distribution was loaded on Aug 27, 2013@08:46:44 with header of
   USH PRF LEGAL SOLUTION 1.0  ;Created on Aug 27, 2013@08:45:32
   It consisted of the following Install(s):
USH PRF LEGAL SOLUTION 1.0    TIU*1.0*275    DG*5.3*864   GMTS*2.7*103
Checking Install for Package USH PRF LEGAL SOLUTION 1.0

Install Questions for USH PRF LEGAL SOLUTION 1.0


Checking Install for Package TIU*1.0*275

Install Questions for TIU*1.0*275


Checking Install for Package DG*5.3*864

Install Questions for DG*5.3*864


Checking Install for Package GMTS*2.7*103
Will first run the Environment Check Routine, GMTSY103


GMTS*2.7*103 has been previously installed.  Environment check complete.

Install Questions for GMTS*2.7*103

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//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//

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//   HOME
```

```
--------------------------------------------------------------------------------
 Install Started for USH PRF LEGAL SOLUTION 1.0 :
                Aug 27, 2013@08:47:06

Build Distribution Date: Aug 27, 2013

 Installing Routines:
                Aug 27, 2013@08:47:06

 Install Started for TIU*1.0*275 :
                Aug 27, 2013@08:47:06

Build Distribution Date: Aug 27, 2013

 Installing Routines:
                Aug 27, 2013@08:47:06

 Running Post-Install Routine: ^TIUPS275

   Title Created: PATIENT RECORD FLAG CATEGORY I - URGENT    ADDRESS AS FEMALE

   Title attached to Document Class PATIENT RECORD FLAG CAT I

 Updating Routine file...

 Updating KIDS files...

 TIU*1.0*275 Installed.
                Aug 27, 2013@08:47:06

 Not a production UCI

 NO Install Message sent

 Install Started for DG*5.3*864 :
                Aug 27, 2013@08:47:06

Build Distribution Date: Aug 27, 2013

 Installing Routines:
                Aug 27, 2013@08:47:07

 Running Post-Install Routine: ^DG53864P
The 'URGENT    ADDRESS AS FEMALE' PRF is already entered in the PRF
NATIONAL FLAG file, install will abort.

 Updating Routine file...

 Updating KIDS files...

 DG*5.3*864 Installed.
                Aug 27, 2013@08:47:07

 Not a production UCI

 NO Install Message sent

 Install Started for GMTS*2.7*103 :
                Aug 27, 2013@08:47:07

Build Distribution Date: Aug 27, 2013
```

```
 Installing Routines:
               Aug 27, 2013@08:47:07

 Running Pre-Install Routine: PRE^GMTSY103

Cleaning up any previous versions of Reminder Exchange file entry

 Installing Data Dictionaries:
               Aug 27, 2013@08:47:07

 Installing Data:
               Aug 27, 2013@08:47:07

 Running Post-Install Routine: POST^GMTSY103

Installing Health Summary Component...

 Filing "CAT I PT RECORD FLAG STATUS" component in Health Summary
    Component has already been installed

Installing Health Summary Types...

Creating stub entries for Remote Health Summary Type.

Removing any previous version of Remote Health Summary Type
1. Installing Reminder Exchange entry VA-HS TYPES GMTS*2.7*103

 Updating Routine file...

 Updating KIDS files...

 GMTS*2.7*103 Installed.
               Aug 27, 2013@08:47:08

 Not a production UCI

 NO Install Message sent

 Updating Routine file...

 Updating KIDS files...

 USH PRF LEGAL SOLUTION 1.0 Installed.
               Aug 27, 2013@08:47:08

 No link to PACKAGE file

                                GMTS*2.7*103
```

```
Install Completed


   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
```