Pharmacy Operational Updates (POU) OneVA Enhancements Phase 1 (PSO*7*643)

Deployment, Installation, Back-out, and Rollback Guide

April 2023

Department of Veterans Affairs

Office of Information and Technology (OIT)

Revision History

Date	Version	Description	Author
04/06/2023	1.0	Initial Version	REDACTED

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1   Introduction

This document describes how to deploy and install the Pharmacy Operational Updates project's VistA Patch PSO*7.0*643, as well as how to back-out the patch and rollback to a previous version or data set. This patch implements OneVA enhancements to Outpatient Pharmacy (PSO) functionality. This document is a companion to the project charter and management plan for this effort.

1.1   Purpose

The purpose of this plan is to provide a single, common document that describes how, when, where, and to whom the PSO*7.0*643 patch will be deployed and installed, as well as how it is to be backed out and rolled back, if necessary. The plan also identifies resources, communications plan, and rollout schedule. Specific instructions for installation, back-out, and rollback are included in this document.

1.2   Dependencies

It is assumed that this patch is being installed into a fully patched Veterans Health Information System and Technology Architecture (VistA) system. The following patches must be installed prior to this patch:

PSO*7.0*441

PSO*7.0*559

PSO*7.0*594

PSO*7.0*603

1.3   Constraints

There are no constraints beyond the installation into an up-to-date VistA system.

2   Roles and Responsibilities

The following describes the roles and responsibilities associated with the testing and releasing of PSO*7.0*643. This VistA patch will be deployed via the normal PackMan Kernel Installation & Distribution System (KIDS) Build.

Table 1: Deployment, Installation, Back-out, and Rollback Roles and Responsibilities

ID	Team	Phase / Role	Tasks	Project Phase (See Schedule)
1	Project Manager	Deployment	Determine and document the roles and responsibilities of those involved in the deployment	Design
2	Software Quality Assurance (SQA), Test Sites	Deployment	Test for operational readiness	Test

ID	Team	Phase / Role	Tasks	Project Phase (See Schedule)
3	Project Manager, Release Manager	Deployment	Execute deployment	Release
4	Individual VistA Sites	Installation	Plan and schedule installation	Release
5	Release Manager	Back-out	Confirm availability of back-out instructions and back-out strategy (what are the criteria that trigger a back-out)	Release
6	Sustainment Team	Post Deployment	Hardware, Software and System Support	Sustain

3　Deployment

The deployment is planned as a simultaneous (National Release) rollout. Once approval has been given to nationally release, PSO*7.0*643 will be available for installation and deployment at all sites.

Scheduling of test installs, testing, and production deployment will be at the site's discretion. It is anticipated there will be a 30-day compliance period.

3.1　Timeline

The deployment and installation are scheduled to run for 31 days, as depicted in the master deployment schedule for Pharmacy Operational Updates patch PSO*7.0*643.

Task	Start	Finish
National Release	4/18/23	4/18/23
Compliance Period	4/18/23	5/18/23

3.2　Site Readiness Assessment

This section discusses the locations that will install patch PSO*7.0*643.

3.2.1　Deployment Topology (Targeted Architecture)

This release is a patch intended for installation at local sites.

3.2.2　Site Information (Locations, Deployment Recipients)

The Initial Operating Capability (IOC) sites are:

- Miami, FL
- Minneapolis, MN
- New Jersey

Upon National Release all Veterans Affairs Medical Centers (VAMCs) are expected to install this patch prior to or on the compliance date. The software will be distributed in FORUM.

3.2.3 Site Preparation

The patch does not require any site preparations other than the prerequisite patch installations as described in the Patch Description.

3.3 Resources

3.3.1 Facility Specifics

No specific facility instructions needed.

3.3.2 Hardware

No hardware instructions needed.

3.3.3 Software

No software instructions needed.

3.3.4 Communications

When PSO*7.0*643 is released, the released-patch notification will be sent from the National Patch Module to all personnel who have subscribed to notifications for the Outpatient Pharmacy package.

3.3.4.1 Deployment / Installation / Back-out Checklist

The Release Management team will deploy the patch PSO*7.0*684, which is tracked in the National Patch Module (NPM) in FORUM, nationally to all VAMCs. FORUM automatically tracks the patches as they are installed in the different VAMC production systems as described in the previous section. One can run a report in FORUM to identify when the patch was installed in the VistA production at each site, and by whom. A report can also be run to identify which sites have not installed the patch in their VistA production system as of that moment in time.

Therefore, this information does not need to be manually tracked. Table 2 is included below if manual tracking is desired and because it is part of the Veteran-focused Integration Process (VIP) document template.

Table 2: Deployment / Installation / Back-out Checklist

Activity	Day	Time	Individual who completed task
Deploy	TBD	TBD	TBD
Install	TBD	TBD	TBD
Back-out	TBD	TBD	TBD

4 Installation

4.1 Pre-installation and System Requirements

This product is a VistA patch. The only pre-installation and system requirements for deployment and installation of this patch are to ensure that the prerequisite patches are installed.

4.2   Platform Installation and Preparation

This product is a VistA patch. Sites should install patches into the test/mirror/pre-prod accounts before the production account as is the normal VistA patch installation standard convention. Pre and Post installation checksums are found in the Patch Description in the FORUM NPM.

4.3   Download and Extract Files

Download and extract files that are not applicable for this VistA patch.

4.4   Database Creation

Database creation is not applicable for this VistA patch.

4.5   Installation Scripts

Installation scripts are not applicable for this VistA patch.

4.6   Cron Scripts

Cron scripts are not applicable for this VistA patch.

4.7   Access Requirements and Skills Needed for the Installation

To install this VistA patch, the patch installer must be an active user on the VistA system and have access to the VistA menu option "Kernel Installation & Distribution System" [XPD MAIN] and have VistA security keys XUPROG and XUPROGMODE. Knowledge on how to install VistA patches using the items on this menu option is also a required skill.

4.8   Installation Procedure

Pre/Post Installation Overview:

There are no pre-installation or post-installation activities with this patch.

Pre-Installation Instructions:

This patch should be installed when Pharmacy applications are not in use, no other pharmacy patches are being installed, and when tasked jobs from Clinical Applications are not running. Installation should also occur when CPRS usage is at a minimum, particularly medication activities.

Installation of this patch should take less than 5 minutes.

Installation Instructions:

1. Choose the PackMan message containing this build. Then select the INSTALL/CHECK MESSAGE PackMan option to load the build.

2. From the Kernel Installation and Distribution System Menu, select the Installation Menu. When prompted for the INSTALL NAME, enter the patch number: PSO*7.0*643. From this menu:

    a. Select the Verify Checksums in Transport Global option to confirm the integrity of the routines that are in the transport global.

When prompted for the INSTALL NAME enter PSO*7.0*643.

b. Select the Backup a Transport Global option to create a backup message. You must use this option and specify what to backup, the entire build or just routines.

The backup message can be used to restore the routines and components of the build to the pre-patch condition.

    i. At the Installation option menu, select Backup a Transport Global.

    ii. At the Select INSTALL NAME prompt, enter your build PSO*7.0*643.

    iii. When prompted for the following, enter "R" for Routines or "B" for Build.

Select one of the following:

        B   Build

        R   Routines

Enter response: Build

    iv. When prompted "Do you wish to secure your build? NO//", press <Enter> and take the default response of "NO".

    v. When prompted with, "Send mail to: Last name, First Name", press <enter> to take default recipient. Add any additional recipients.

    vi. When prompted with "Select basket to send to: IN//", press <enter> and take the default IN mailbox or select a different mailbox.

c. You may also elect to use the following options:

    i. Print Transport Global - This option will allow you to view the components of the KIDS build.

    ii. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all of the components of this patch.

d. Select the Install Package(s) option and choose the patch to install.

    i. When prompted 'Want KIDS to INHIBIT LOGINs during the install? NO//', answer NO.

    ii. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//, answer NO.

Post-Installation Instructions:

Validate that the routine checksums now match the 'after checksums' listed in the Patch Description.

4.9   Installation Verification Procedure

Validate that the routine checksums now match the 'after checksums' listed in the Patch Description.

4.10   System Configuration

System configuration is not applicable for this VistA patch.

4.11   Database Tuning

Database tuning is not applicable for this VistA patch.

5   Back-out Procedure

5.1   Back-out Strategy

The development team recommends that sites log a ticket if it is a nationally released patch; otherwise, the site should contact the development team directly for specific solutions to their unique problems.

5.2   Back-out Considerations

It is necessary to determine if a back-out of the patch PSO*7.0*643 is needed, or if issues may be adequately addressed via a new version of the patch (if prior to national release) or through a subsequent patch (if after national release).

A back-out of the patch will require the installation of patch PSO*7.0*708, which is the backout/rollback patch for PSO*7.0*643. If needed, log a ServiceNow ticket to obtain a copy of the backout/rollback patch for PSO*7.0*708, and for assistance in the backout process.

5.2.1   Load Testing

Load Testing is not applicable for this VistA patch.

5.2.2   User Acceptance Testing

For User Acceptance Testing results, please log a ticket if the patch is nationally released; otherwise, contact the development team.

5.3   Back-out Criteria

The decision to back-out this VistA patch will be made by Health Product Support, the development team, and site personnel. Criteria to be determined based on separate and unique factors and will be evaluated upon post-patch installation use of the product.

5.4   Back-out Risks

Back-out risks are not applicable for this VistA patch.

5.5   Authority for Back-out

Any back-out decision should be a joint decision of the Business Owner (or their representative) and the Program Manager with input from the Health Product Support (HPS) Application Coordinator, HPS Support, the project development team.

5.6   Back-out Procedure

Patch PSO*7.0*708, when installed, will back-out patch PSO*7.0*643. The was done mainly due to the complexity of how to handle new data that may have been entered for prescriptions

while PSO*7.0*643 was installed. Patch PSO*7.0*708 is released because PSO*7.0*643 is nationally rolled back. Even if PSO*7.0*643 was never installed, PSO*7.0*708 must still be installed.

NOTE It is not necessary to install the backup that was made when PSO*7.0*643 was installed. The only thing that needs to be done is the install of patch PSO*7.0*708 ***

The 'before' checksums in the PSO*7.0*708 Patch Description will only be correct if PSO*7*643 has never been installed.

Here is what PSO*7.0*708 does upon install, in regard to the components that were exported in PSO*7.0*643:

Data Dictionaries:

These modified data dictionaries were sent out in PSO*7.0*643. We will keep the changes going forward, so we are sending them out again in PSO*7.0*708 as they were sent out in PSO*7.0*643:

PRESCRIPTION (#52)

REFILL subfile (#52.1)   REMOTE FILL SITE (#91)

PARTIAL DATE Subfile (#52.2)   REMOTE FILL SITE(#91)

REMOTE PRESCRIPTION LOG (#52.09)   REMOTE FILLING PERSON (#.061)

These new data dictionaries will be sent out as they were in PSO*7.0*643, with the exception of a notation in each field description indicating that these are not being used, due to the fact that this a rollback build.

The reason these fields are being sent out is because data may have been entered into these fields while PSO*7.0*643 was installed, and that data cannot be deleted. And since the data remains, the data dictionaries cannot be deleted, and data dictionaries need to be in sync among all sites:

PRESCRIPTION (#52)

REFILL subfile (#52.1)

       REMOTE CHECKING PHARMACIST (#97)

       REMOTE FILLING PERSON (#96)

PARTIAL DATE Subfile (#52.2)

       REMOTE CHECKING PHARMACIST (#97)

       REMOTE FILLING PERSON (#96)

REMOTE PRESCRIPTION LOG (#52.09)

       REMOTE CHECKING PHARMACIST (#.062)

       HOST REFILL IEN (#.063)

       HOST PARTIAL IEN (#.064)

       HOST RX LOG IEN (#.065)

       OPAI MESSAGE ID (#4)

HOST SITE ID (#4.1)

DISP ADD NAME(#4.2)

DISP ADD DNS (#4.3)

DISP MULTI ADDS (#4.4)

Protocols:

These new protocols will be deleted, since they were added in PSO*7.0*643 for a new HL7 message that will no longer be used:

PSO DISP RX RDS-O13 EVENT

PSO HOST RX RDS-O13 ESUBS

HL7 Application Parameters:

These new HL7 Application Parameters will be deleted, since they were added in PSO*7.0*643 for a new HL7 message that will no longer be used:

PSO DISP DISP

PSO HOST DISP

Routines:

These routines will be sent out as they were sent out in PSO*7.0*643. They contain the changes to be able to view the new data that may have been entered if/when PSO*7.0*643 was installed:

PSOORAL1

PSOORAL3

PSORRP

PSORXVW1

These routines will be sent out as they existed prior to the install of PSO*7.0*643:

PSOHLDS

PSOLBLN

PSORLLLI

PSORREF

PSORRPA1

PSORRX1

PSORRX2

PSORWRAP

These routines will be deleted, since they did not exist prior to PSO*7.0*643:

PSOHLDS5

PSOHLDS6

5.7   Back-out Verification Procedure

Successful back-out is confirmed by verification that the back-out patch was successfully implemented, including verification that components were removed and modified, as described in section 5.6.

6   Rollback Procedure

6.1   Rollback Considerations

Prior to a backout, data may have been entered in the fields, some new and some modified, that were exported with PSO*7*643, in the PRESCRIPTION (#52) File and the REMOTE PRESCRIPTION LOG (#52.09) File. That data will not be rolled back, and the Data Dictionaries are exported in the backout patch PSO*7.0*708.

6.2   Rollback Criteria

Not applicable.

6.3   Rollback Risks

Not applicable.

6.4   Authority for Rollback

Not applicable.

6.5   Rollback Procedure

Not applicable.

6.6   Rollback Verification Procedure

Not applicable.