Scheduling Package Enhancement

Patch SD*5.3*780

Deployment, Installation, Back-Out, and Rollback Guide

September 2021

Department of Veterans Affairs

Office of Information and Technology (OI&T)

Revision History

Date	Version	Description	Author
9/27/2021	1.0.0	Initial Document Draft	Don Finnie

Artifact Rationale

This document describes the Deployment, Installation, Back-Out, and Rollback Guide for new products going into the VA Enterprise. The plan includes information about system support, issue tracking, escalation processes, and roles and responsibilities involved in all those activities. Its purpose is to provide clients, stakeholders, and support personnel with a smooth transition to the new product or software, and should be structured appropriately, to reflect particulars of these procedures at a single or at multiple locations.

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1. Introduction

The Deployment, Installation, Back-Out and Rollback Guide defines the ordered, technical steps required to install the product, back out the installation (if necessary), and roll back to the previously installed version of the product. It provides installation instructions for SD*5.3*780 patch

1.1 Purpose

The purpose of this Guide is to provide installation steps for the SD*5.3*780 patch. The intended audience for this document is the Information Resource Management Systems (IRMS) staff. Some of the main features of this patch are the following:

This patch includes functionality to set the APPOINTMENT TYPE (#9.5) field in the PATIENT (#2) file equal to 1 (Compensation & Pension) if the secondary stop code for the clinic is equal to 444, 445, 446 or 447. Currently, the Appointment Type defaults to 9 (Regular) for all appointments.

This patch includes functionality to communicate holidays, non-clinic days and blocked hours from VistA to TMP. TMP users will be more aware of which appointment times are available without having to refer to VistA.

In addition, this patch adds the capability to restore cancelled clinic availability for both cancelled days and cancelled hours. If clinic availability is resored in VistA, a HL7 record will be sent to TMP with this information.

This patch moves the location of Telehealth Management Toolbox [SD TELE TOOLS] menu from Supervisor Menu [SDSUP] to Scheduling Manager's Menu [SDMGR] so that the SDSUP key is not required to access it. A new key SDTOOL is added to secure these items in the Telehealth Management Toolbox menu:
- Telehealth Stop Code Add/Edit [SD TELE STOP CODE]
- VistA-Telehealth Clinic Update [SD TELE CLN UPDATE]
- Provider Add/Edit [SD PROVIDER ADD/EDIT]

This patch includes functionality to add the STATION NUMBER (#99) field from the INSTITUTION (#4) file for a clinic to the HL7 record for a new or cancelled appointment and blocked days and blocked hours. It is contained in the 4th ^ piece of the 4th | field in the AIL segment.

This patch corrects an issue of translation of HL7 special characters in the VistA clinic name to escape sequences on the TMP side. This caused a replacement of ("|", "~", "\", "&") with (\F\, \R\, \E\, \T\) respectively. After installation, the special characters are transmitted without translation.

1.2 Dependencies

N/A

1.3 Constraints

N/A

2. Pre-installation and System Requirements

2.1 System Requirements

Package	Minimum Version Needed
VA FileMan	22.0
Kernel	8.0
MailMan	8.0
Health Level 7	1.6
Order Entry/Results Reporting	3.0
CMOP	2.0
NDF	4.0
Outpatient Pharmacy	7.0
Pharmacy Data Management	1.0
Controlled Substances	3.0
Toolkit	7.3
Drug Accountability	3.0

2.2 Platform Installation and Preparation

N/A

2.3 Download and Extract Files

N/A

2.4 Database Creation

N/A

2.5 Installation Scripts

N/A

2.6 Cron Scripts

N/A

2.7 Access Requirements and Skills Needed for the Installation

N/A

3. Installation Procedure

3.1 Installation from the Patch Description

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. 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 the patch or build name (ex. SD*5.3*780).

   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 SD*5.3*780.

      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 the 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, such as routines, DDs, templates, etc.

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

      i.   When Prompted "Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES//" respond Yes.

      ii.   When Prompted "Want KIDS to INHIBIT LOGONs during the install? NO//" respond NO.

      iii.   When Prompted "Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//" respond NO.

      iv.   If prompted 'Delay Install (Minutes): (0-60): 0//' respond 0.

4. Implementation Procedure

4.1 Post-Install Routine (No Action Required)

Routine will execute as a component of the installation. It performs the following functions:
- Finds the existing future non-clinic days and sends the to TMP
- Finds the existing future blocked hours and send them to TMP
- Rebuilds the menu system to activate the menu changes made in the patch

5. Back-Out Procedure

Back-Out pertains to a return to the last known good operational state of the software and appropriate platform settings.

5.1 Back-Out Strategy

See Section 5.6.

5.2 Back-Out Considerations

N/A

5.2.1 Load Testing

N/A

5.2.2 User Acceptance Testing

User Acceptance Testing will be completed by the time patch SD*5.3*780 is released.

5.3 Back-Out Criteria

Back-Out criteria will follow VA guidelines and best practices as referenced in the EO National Data Center Hosting Services document.

5.4 Back-Out Risks

N/A

5.5 Authority for Back-Out

Back-out will be done only with the concurrence and participation of development team and appropriate VA site/region personnel. The decision to back-out or rollback software will be a joint decision between development team, VA site/region personnel and other appropriate VA personnel.

5.6 Back-Out Procedure

Prior to installing an updated KIDS package, the site/region should have saved a backup of the routines in a mail message using the Backup a Transport Global [XPD BACKUP] menu option (this is done at time of install). The message containing the backed-up routines can be loaded with the "Xtract PackMan" function at the Message Action prompt. The Packman function "INSTALL/CHECK MESSAGE" is then used to install the backed up routines onto the VistA System.

If the patch was backed up for the build, from the Kernel Installation and Distribution System Menu, select the Installation Menu. Select the Install Package(s) option and choose the patch (xxx*x.x*xxxb) to install.

The back-out plan is to restore the routines from the backup created.

No data was modified by this patch installation and, therefore, no rollback strategy is required.

The Back-out Procedure can be verified by printing the first 2 lines of the routine contained in this patch using the option First Line Routine Print [XU FIRST LINE PRINT]. Once the routine contained in the SD*5.3*780 patch has been backed out, the first two lines of the routine will no longer contain the designation of this patch in the patch.

6. Rollback Procedure

6.1 Rollback Considerations

A follow-up rollback patch would be needed to remove new data entries established by the data dictionary.

> Note: These new data entries are the result of fields added to the data dictionary, or the modification of existing fields in the data dictionary.

6.2 Rollback Criteria

Rollback criteria will follow VA guidelines and best practices as referenced in the EO National Data Center Hosting Services document.

6.3 Rollback Risks

N/A

6.4 Authority for Rollback

The authority for rollback would come from the project IPT, the VA project manager, and other relevant stakeholders, where applicable.

6.5 Rollback Procedure

In the situation where a rollback would be necessary, the development team will be contacted, and a rollback patch will be provided for the site to install. The rollback patch will roll back changes that cannot be affected by the installation Back-Out routines outlined in section 5.6.

7. Additional Information

If you have any questions concerning the implementation of this application, contact the VA Service Desk at 1-855-673-4357 directly or log a ticket via VA yourIT Service Portal application (https://yourit.va.gov/va).

7.1 Documentation

Updated documentation describing the new functionality introduced by this patch is available.

File Description	File Name
Telehealth Management Platform VistA Manual	SD_5_3_P557_UM.docx
PIMS Technical Manual	

Documentation describing the new functionality is included in this release. Documentation can be found on the VA Software Documentation Library at: https://www.va.gov/vdl/.

Documentation can also be obtained at https://download.vista.med.va.gov/index.html/SOFTWARE.