

# **Telehealth Management Platform (TMP)**

## **Release Notes D365 v4.6**



**Department of Veterans Affairs**

**September 2019**

Version 1.0



# TMP D365 v4.6 Release

## Telehealth Management Platform

Microsoft TMP Development Team

Sept 2019



# Table of Contents

- TMP Release 4.6 D365 Notes
- Release Information
- Known Issues
- Legacy Scheduling Process
- 4.6 Scheduling Process
- Legacy Telehealth Process
- Scheduling Packages

# TMP Release 4.6 D365 Release

## **Migration to the Cloud**

- TMP is migrated and upgraded from On Premise 2015 to Online D365 v9. This prepares TMP to leverage latest cloud features and workflows.
- On premise integration layer (VIMT) is replaced with Veterans Enhanced Integration Services (VEIS)
- Menu Navigation streamlined

## **VistA Integration Updates**

- VistA integration is now through industry standard HL7 - Make/Cancel Appointments (bi-directional TMP<==>VistA).
- Realtime Clinic updates (new or updated Clinics flow from VistA to TMP)
- Support for Return to Clinic Orders in addition to Consults
- Ability to schedule both Provider and Patient sides of appointment with sign-on to either facility

## **Scheduling Package Updates**

- Replaces use of TSA/MTSA in the appointment creation process  
Scheduling Package selection instead. MTSA's renamed to Archived Agreements.
- Scheduling packages include all required resources for each site and user can bundle site resources depending on setup needs.  
This works as a template for making appointments (with included Provider, Technology, Room, Paired Resource Groups, VistA Clinics...)

## **Other Efficiencies**

- Email updates (e.g. Clinic Based Provider email, etc....)
- Role name changes (TSA Manager => Scheduling Package Manager)
- View changes (Appointment, Facility Approvals,...)
- New/Updated reports (Inventory reports, TSA2.0, Provider Preferences)
- Bug fixes (CVL attachment, Business Process Error, etc..)

# TMP Release Information

## Scheduling Packages

- Defined by Specialty/Subspecialty/Modality **and Provider Facility** and **Usage Type**
  - Naming convention updated
  - Intrafacility/Interfacility
  - Group (for group appointments)
  - Provider Facility indicated on each SP
  - Usage Type of Scheduling or TSA on each SP
  - SPs of usage type TSA generate the Facility Approvals, Scheduling usage type **DO NOT**
  - Only SPs of usage type Scheduling are selectable in Appointment Scheduling
  - Business users must verify Facility Approvals are in the approved status before enabling the site level Can Be Scheduled flags
- Minimal system validations when adding VistA clinic resources (e.g. only one VistAClinic as necessary on participating sites)
- SP Manager user must ensure that correct resources are added (e.g. Active VistAClinics).

# TMP Release Information

1. As part of the deployment, existing Scheduling Packages(SPs) in PROD\_ **will be deleted** and SP data transferred from PROD2 into PROD. All the SPs currently in PROD2 will be of usage type Scheduling.
2. The SP Data Transfer includes Resources, Resource groups, Teams, Team memberships and other data used by SPs in PROD2. Any errors in its execution are logged and must be reviewed for next steps (e.g. additional data setups directly in PROD post deployment).
3. When creating Scheduling Packages - Create both Scheduling and TSA usage type SPs for the required field combinations (e.g. Provider Facility and Modality (CVT, SFT), Hub Facility...).
4. Normal operation of the TMP Application is dependent on the availability of the servers hosting the entire end to end solution: CRM, VEIS, HL7, VistA servers.

# TMP Release Information

The following are known issues with this release that will be addressed in subsequent hotfixes:

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# Known Issues

The following are identified issues with this release that will be addressed in subsequent hotfixes:

- **PostMaster issue:** Presently in TMP, when scheduling interfacility appointments and the scheduler doesn't have a VistA account on both systems, TMP will indicate PostMaster as the Responsible Party scheduling on the remote system. Presently the policy denotes the scheduler ID must be present for auditing. TMP security model is used for scheduling permissions - VistA security keys and menus and restricted clinic access are not checked by TMP.

This will be addressed with Postmaster TMP future fix (see also OVAC documentation). Specifications on all requirements pending approval from VA. Dates are estimates based on requirements approval. Estimated timeframe for repair development: 10/16 Rational Defect ID: 1119866

- **Next Available Time issue:** In VistA, the 'Next Available' Type fields, within the Appointment wait time fields, are automatically populated with "NO" Scheduling Staff are instructed that this should always be No. TMP is presently using the VSE logic, the field is left blank.

VSE and OR team to provide a future fix (see also OVAC documentation). VSE team is working with OVAC to determine timeframe for this release. Not a TMP issue. Rational Defect ID: 1119868

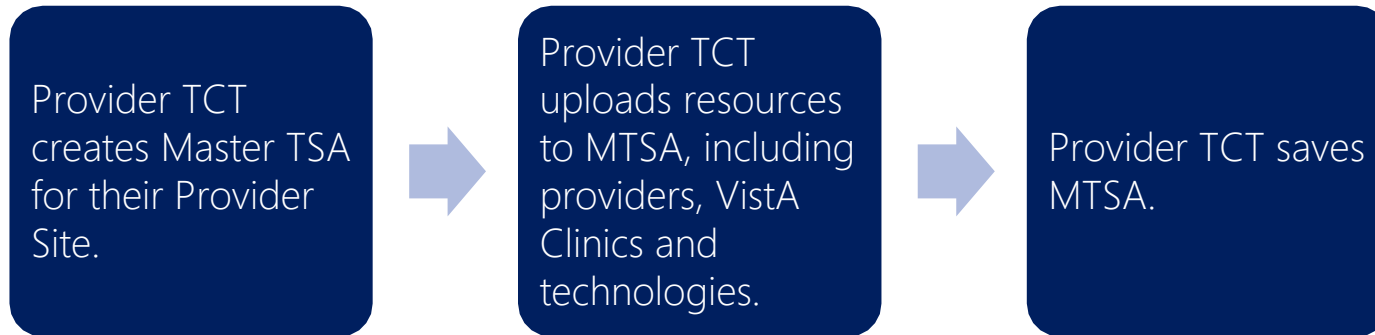
- **Patient Double Booking** – Potential for double booking a patient when both an intrafacility and interfacility appointment are made for the same time.

This will be addressed with TMP future fix. Repair is completed. This fix will be bundled with the PostMaster issue fix, as IOC testing has to be completed for both issues concurrently. Rational Defect ID: 1119873

# Legacy Scheduling Process

Using a Master Telehealth Service Agreement

## 1) Provider TCT creates Master Telehealth Service Agreement.



## 2) Patient TCT creates Telehealth Service Agreement using the Provider Site's MTSA.

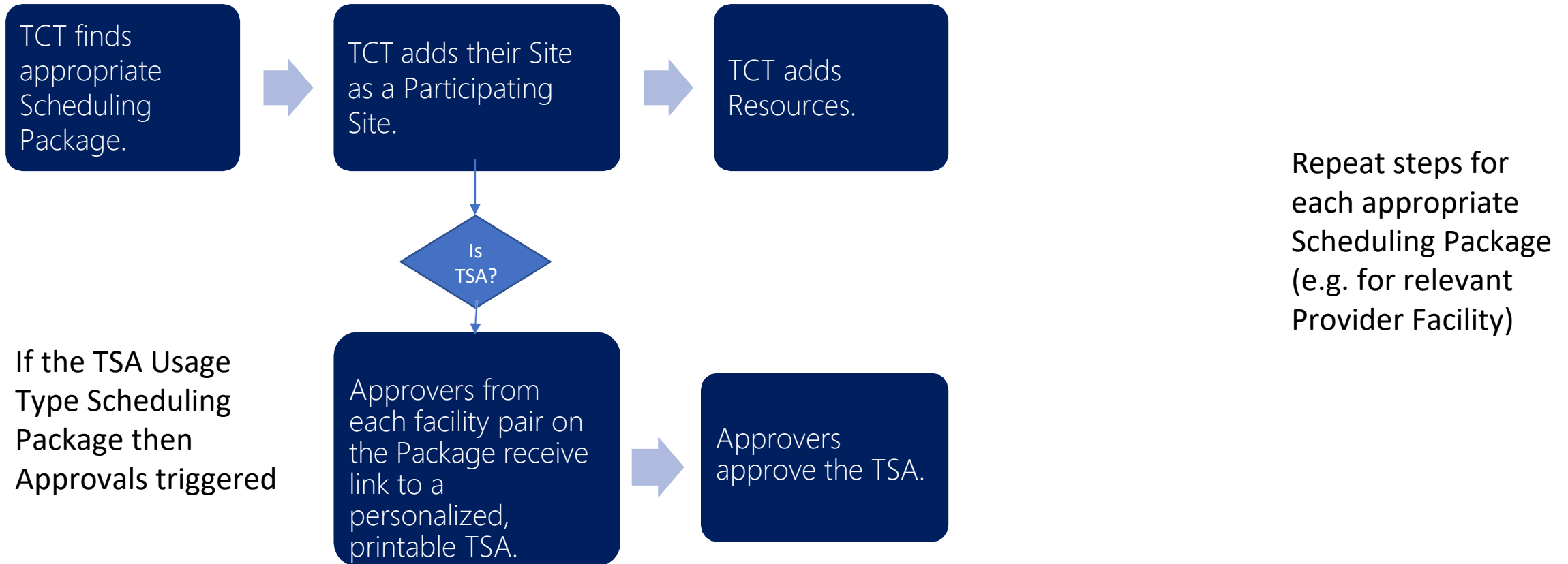


## 3) Scheduler uses TSA to search for available times between 1 patient site and 1 provider site.

# 4.6 Scheduling Process

Leveraging new Scheduling Package (SP) functionality

1) TCT (Provider or Patient) adds their Site to existing Scheduling Packages.



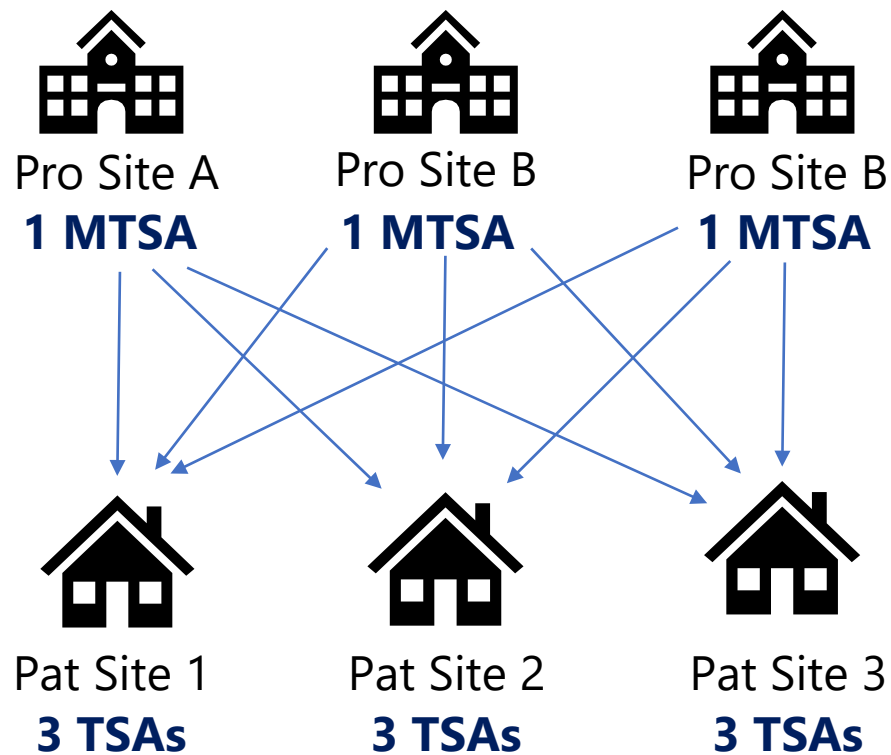
2) Scheduler uses the Scheduling Package to find available times between that Site and *specific* approved facility.

# 4.6v2 Scheduling Process

Leveraging new Scheduling Package functionality

**Scenario:** 3 Provider Sites within the same Facility offer a clinic-based Audiology service to 3 Patient Sites.

## Previous TSA Structure



## New Scheduling Package Redesign



### Provider Sites:

- Provider Site A
- Provider Site B
- Provider Site C

### Patient Sites:

- Patient Site 1
- Patient Site 2
- Patient Site 3

- **N Scheduling Packages – 1 for each Combination of Specialty/Modality/Provider Facility /Intra or Inter / Group or Ind / Hub**
- **Flexible VistA Clinics specified in SP Definition, no longer**

# 4.6v2 Scheduling Process

Telehealth Management Platform  
March 2019

Leveraging new Scheduling Package functionality

1  
d  
c  
o  
d  
e  
d

Microsoft Dynamics CRM

TELEHEALTH ADMINISTRATION

TSAs

Cardiology From Af...

Create

Enter Search Item

+ NEW

APPROVE TSA

DENY TSA

DEACTIVATE

DELETE

ADD TO QUEUE

QUEUE ITEM DETAILS

TSA : INFORMATION

Cardiology From Afton, WY OC (666)

TSA

Name \*

Cardiology From Afton, WY OC (666)

TSA(Production Lock) ~ Save in Draft to Edit

General

Provider Location Type \*

Patient Location Type \*

Available Telehealth Modalities

Specialty \*

Specialty Sub Type

Patient Site \*

Patient Facility

Provider Site \*

Provider Facility

Clinic Based

Clinic Based

Clinical Video Telehealth

Cardiology

--

Abilene, TX CBOC (519HC)

West Texas VA HCS

Afton, WY OC (666)

Sheridan VAMC

Appointment Scheduling

Appointment Instructions

--

Start Appointments Every

--

Standard Appointment Length

--

Status Reason

Service Scope

Group Clinic

Service Levels \*

Production

InterFacility

No

Teleconsultation & Telemedicine

Operations Manual

Telehealth Operations Manual

Specialty Operations Supplement

<http://www.globalTMP-opsManual.com>

<http://www.bing.com>

# Scheduling Package System View Example

Acftv Scheduling Packages																					
01	S	ity	S	alty S b-T)'PT'	A	L, oat, onT	Pn!Yld	bOnlyp	Group Appoint	I	In	orln	II	I: > rovid, erF	I	Hui	T				
ESCVT•P	AnfflJ	Its:iology	Oin	VideoT	ht	Oinic Sand	01	icin	No		lnrra		Sheridan V.	5htrid	V,,...						
ES SFT•p	Anesthesiology		Store and Fcnvml		Oink Based		C:T	c Bated	No												
CAAOIOM		Cardiology	OInGIIVi		nk Bis, eel		01	c Suecl	YM		lnu	ICili	Em	Color	&	Color					
CAADIO		Cardiology	Oi		llic: B.asld		0,1	ic lat					El fl\	Color...							
IOM		Cardiology	Qin	Video T	he	- Clinic ased	a	c Uld	No				East	Color							
CARDIO		Cltldology	01	VideoT	1,e	• ic B.lsed	01	B&ed			lll		Eas	Color							
ow:no M		Cardl01ggy	01,		nicB-acecl		0	<:Buod			lll		Eu tmColOr...			Bly nt:s ..					
CARDIOCVT		Cardiology	Om"		Qi ic E Sed		Oi	c Ra.md	No		Interfa,a, cj		Ea5	Color...							
CARDIO		Cardiology	01		'nk B.ased		Qi	BJ&ed			l led	ity	Say	nes CS							
CAP.DIOM		c.arcllO!oiY	01,-	Video T	ht	.. inc:B.asld	Oinicias		No		l t«facili		&11 tin	Color							
CARDIO		C'.ardiok>gy	Oin"Cil	Video T	ehe	- Clinic itied	Omic Based		No		l eff	ity	EasternColor...								
CAADIOM		rdlol.ogy	Oin1ul	Vfdeo T		nlc Sued	Oink 8:e		No				East	Color							
CA.RDIOM		Clfcllciogy				nlc;BHtd	01nlc las		No		ln		ill	em Color ..							
1 - SO of 99 (0 selected)																					
All																					
a																					
C																					
O																					
E																					
F																					
G																					
H																					
J																					
K																					
I																					

# Scheduling Package – InterFacility Sample - Scheduling Usage Type

U.S. Department of Veterans Affairs

Telehealth Ad... > Scheduling Packages > CARDIO CVT - Pat C... >

SANDBOX

+ NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

WORD TEMPLATES

...

SCHEDULING PACKAGE : INFORMATION

CARDIO CVT - Pat CB, Pro CB, Ind, Intra

Configuration

Details

Provider Location Type

Clinic Based

Patient Location Type

Clinic Based

Available Telehealth Modality

Clinical Video Telehealth

Group Appointment

No

Intra or Interfacility

Intrafacility

Usage Type

Scheduling

If applicable, please indicate the Hub:

Hub

Provider Facility

Eastern Colorado HCS

Participating Sites

Provider Sites

Patient Sites

Specialty

Specialty

Cardiology

Specialty Sub-Type

Other Specialty Details

Specialty Operations Manual

Alias (H.323 & SIP Dial-in)

testalias.com

Appointment Defaults

Appointment Length

1 hour

Start Appointments Every

15 minutes



# Scheduling Package – InterFacility Sample – TSA Usage Type

U.S. Department of Veterans Affairs

Telehealth Ad... > Scheduling Packages > Cardiology CVT - Pat... >

SANDBOX

+ NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

WORD TEMPLATES

...

SCHEDULING PACKAGE : INFORMATION

Cardiology CVT - Pat CB, Pro CB, Ind, Inter

Configuration

Details

Provider Location Type

Clinic Based

Patient Location Type

Clinic Based

Available Telehealth Modality

Clinical Video Telehealth

Group Appointment

No

Intra or Interfacility

Interfacility

Usage Type

TSA

If applicable, please indicate the Hub:

Hub

Bay Pines HCS

Provider Facility

Eastern Colorado HCS

Specialty

Specialty

Cardiology

Specialty Sub-Type

Other Specialty Details

Inter-Hub

Specialty Operations Manual

Alias (H.323 & SIP Dial-in)

testalias.com

Appointment Defaults

Appointment Length

1 hour

Start Appointments Every

15 minutes

Participating Sites

Provider Sites

Active

Patient Sites

# Scheduling Package – InterFacility Sample - TSA Usage Type has Facility Approvals

SCHEDULING PACKAGE : INFORMATION

Cardiology CVT - Pat CB, Pro CB, Ind, Inter ≡

Details

Provider Location Type

■ Clinic Based

Patient Location Type

■ Clinic Based

Available Telehealth Modality

■ Clinical Video Telehealth

Group Appointment

■ No

Intra or Interfacility

■ Interfacility

Usage Type

■ TSA

If applicable, please indicate the Hub:

Hub

■ Bay Pines HCS

Provider Facility

■ Eastern Colorado HCS

Specialty

Specialty

■ Cardiology

Specialty Sub-Type

■ -----

Other Specialty Details

Inter-Hub

Specialty Operations Manual

■ -----

Alias (H.323 & SIP Dial-in)

testalias.com

Appointment Defaults

Appointment Length

1 hour

Start Appointments Every

15 minutes

Participating Sites

Provider Sites

+

≡

TMP Site ↑	Facility	Location Type	Can Be Scheduled	Created On
Alamosa, CO CBOC (554GF)	Eastern Colorado HCS	Provider	No	7/25/2019 11:49 AM
Aurora, CO CBOC (123)	Eastern Colorado HCS	Provider	No	7/23/2019 5:45 PM
Denver, CO VAMC (554)	Eastern Colorado HCS	Provider	No	7/25/2019 11:46 AM

Patient Sites

+

≡

TMP Site ↑	Facility	Location Type	Can Be Scheduled	Created On
Aberdeen, SD CBOC (438GD)	Sioux Falls VA HCS	Patient	No	7/23/2019 5:46 PM
C.W. Bill Young VAMC (545)	Bay Pines HCS	Patient	No	8/21/2019 9:30 AM

Facility Approvals

+

≡

Provider Facility ↑	Patient Facility	Status Reason...
Eastern Colorado HCS	Bay Pines HCS	Approved

# Scheduling Package – IntraFacility Sample – Always Usage Scheduling

U.S. Department of Veterans Affairs

Telehealth Ad...

Scheduling Packages > DENT CVT - Pat VVC,...

SANDBOX

+ NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

WORD TEMPLATES

...

SCHEDULING PACKAGE : INFORMATION

DENT CVT - Pat VVC, Pro CB, Grp, Intra

Configuration

Details

Provider Location Type

Clinic Based

Patient Location Type

VA Video Connect

Available Telehealth Modality

Clinical Video Telehealth

Group Appointment

Yes

Intra or Interfacility

Intrafacility

Usage Type

Scheduling

If applicable, please indicate the Hub:

Hub

Provider Facility

Bay Pines HCS

Patient Facility

Bay Pines HCS

Specialty

Specialty

Dental

Specialty Sub-Type

Other Specialty Details

VVC, Inter, Group Yes

Specialty Operations Manual

<http://vawww.infoshare.va.gov/sites/telehealth/docs/tdnts-spp.pdf>

Alias (H.323 & SIP Dial-in)

<http://alias.com>

Appointment Defaults

Appointment Length

1 hour

Start Appointments Every

15 minutes

Participating Sites

# Scheduling Package – SP Selection during appointment creation

FILE

APPOINTMENT

CUSTOMIZE

Save

Save and Close

Save and New

Add Note

Find Available Times

Email a Link

Run Workflow

Start Dialog

Flow

Word Templates

Include

Actions

Analytics

Collaborate

Process

Data

Appointment : Information

– Patient Search

– Confirm Scheduling P...

– Consults

– Find Available Times

– Appointment Informa...

– Additional VMR Recip...

– Vista Bookings

– Notes

– Details

Related

Common

Connections

Audit History

Email Messages

Reserve Resources

Resource Bookings

Patients

Vista Integration Resu...

Tasks

Group Patients

Patient Site Rooms

Non-VA Emails

Integration Results

Process Sessions

Background Processes

Real-time Processes

Appointment

New Appointment

Appointments

Confirm Scheduling Package

Filter Criteria

Type

☐ Clinic Based

☒ VA Video Connect

Group Appointment:

☒ No

☐ Yes

Provider Site \*

Fitchburg, MA CBOC (660)

Specialty

Dental

Specialty Sub-Type

Provider

Scheduling Package

Scheduling Package \*

Dental CVT - Pat HM, Pro CB, Ind, Intra

Scheduling Comments (Sent to VistA)

Vista Login

Login	Status	Details
SAML Token	✓	<div>Login</div> <div>Check passed: Token is valid.</div>
Patient Duz		
Provider Duz	✓	VistA login with Access/Verify successful for 660.