



Record Tracking V. 2.0

Release Notes

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Revision History

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Date	Description (Patch # if applic.)	Project Manager	Technical Writer
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Revision History

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New Menu Options

INACTIVATE RECORDS MENU (RECORD TRACKING TOTAL SYSTEM MENU)

Generate Record Retirement Pull Lists

Pull lists are generated by selecting a range of terminal digits or by file number. Limiting the range by terminal digit is mainly to allow more manageable lists to be produced with the initial implementation. Later, the job can be tasked to run periodically at a convenient interval.

Generating record retirement pull lists for MAS and RAD applications using terminal digits will look at the following criteria for inactive patients/records:

- Scheduling visits and appointments
- ADT dispositions and movements
- Inpatient status

If there is no activity in the system for the range determined by the System Definition Menu, Type of Record Set-up option, RETIRE RECORD CUTOFF parameter, the record will be included on the pull lists.

Looking at the ADT and Scheduling activity instead of record activity will allow the sites to utilize the record retirement options even though they do not have three years of Record Tracking data on file.

Pull lists generated using file number will scan record movements. If there have been no movements within the "record retirement window", and the record does not have a REASON NOT TO RETIRE field set, a request for the record will be added to the record retirement pull list.

The pull lists are created with names derived from the current location of the record and the first day of the next month. If there is no current location, a pull list name is created from the home location and the first day of the next month. If there is no home location, a pull list is created with the name "unknown". The date is used just to combine lists and has no other significance.

An example might be as follows:

```
RR CENTRAL FILE ROOM [05/01/91] 2,000 requests
RR UPSTAIRS FILE ROOM [05/01/91] 500 requests
RR UNKNOWN LOCATION [05/01/91] 20 requests
```

Print Record Retirement Pull list

This option is the same as the regular Print Pull List(s) option except only pull lists with a type RECORD RETIREMENT are printed. The requests are basically sorted by pull list name and terminal digit.

Designate Retirement Requests as 'Not Fillable'

After they are printed, the pull lists are used to pull the records scheduled for retirement. As with other pull lists, for any record that cannot be located or for records which should not be retired, the request should be made "not fillable" on the list.

Delete a Record

If the record does not exist, the record can be deleted.

Create a Label/Record/Volume

A new perpetual record can be created to hold the appropriate information that will be retained from the records to be retired.

Charge Out/Transfer Retirement Pull Lists

When the retirement pull lists are charged out, the records are actually "transfer retired" to the appropriate institution where records are sent for storage. The record status is inactivated.

The user will be prompted with the application default record retirement borrower. Institution borrowers are allowed. Applications which just retire records, such as Radiology, should use the local institution as the borrower. The default borrower will be the DEFAULT RETIREMENT BORROWER in the System Definition Menu, Application Set-up option.

```
Select Record Retirement Borrower: FEDERAL RECORDS CENTER GSA-1//
```

The user will be asked if a perpetual type record should be created for each patient on the pull lists. If perpetual records are not required, enter NO.

```
Do you want to create 'PERPETUAL FOLDER' records from Pull list? Yes//
```

If perpetual records are to be created, the user will be prompted for an accession number for these records. This will be stored in the content descriptor field of the perpetual record. In the future, this number will enable the system to look up the location of the retired record at the record center.

```
Enter the Record Center's accession number for these records: 345034929
```

```
Are you sure you want to 'CHARGE OUT' these records? No// YES
```

TRANSFER RECORDS MENU (TRANSACTION MENU)

Create Record/Volume for transferred Record

When a record is received from another institution, this option will create a record with a movement type TRANSFER INITIAL CREATION. The content description field will also be prompted to allow the user to add a comment.

Request a Transfer from another Institution

This option will create a bulletin (Form 70-7216a - "Request for and/or Notice of Transfer of Veterans Record") which will be sent to a mail group and/or request printer at the remote institution. The user fills in record information only; routing information is stored by remote file room.

Return Transferred Record

This option is the same as the previous Transfer Records option when a movement type of TRANSFER BACK FROM OTHER VAMC was selected.

Transfer Record to another Institution

A user is allowed to enter a past date for the transfer. After a record is transferred, the user is also prompted to create the bulletin, Form 70-7216a - "Request for and/or Notice of Transfer of Veterans Record".

New Menu Options

New Options

Expanded Record Inquiry (Record Information Menu)

This inquiry option shows the last three clinic appointments, last admission and discharge, in addition to current location, movement, date of movement, etc., for a patient's records.

File Room/Remote Set-up (Site Mgr) (Computer Site Manager's Menu)

This option is used to define the domains, remote printers and/or request groups, and mail routing symbols for transmission of remote record requests or notice of transfers to allowed VAMCs. A profile of known entries is displayed for reference upon entering the option.

New Options

Changed Options

Users

TRANSACTION MENU

CHK Check-in Records

When records are checked-in to a file room, the notification of a pending request can be disabled or limited to a date range by a parameter in the Type of Record Set-up. This is transparent to the user.

REQUEST RECORDS MENU

Cancel a Request

When a request for a record is canceled, a cancellation bulletin can be sent to a mail group and/or the file room request printer. This is transparent to the user.

PULL LIST FUNCTIONS MENU

Print Pull List(s)

- Pull lists print home location and date with terminal digit sort.
- AD HOC pull lists print name, #, and comment with terminal digit sort.
- Inpatients can be excluded from the pull lists by a parameter.
- Appointment type(s) can be excluded from the pull lists by parameter.
- Pull lists are generated for scheduled admissions by a designated borrower. The name of the list has a format SA 'Borrower' [mon/day/yr].
- Barcodes will print for records on a pull list if defined by the BARCODE RENEW CUTOFF parameter. This was implemented in Patch RT*1.26*14.
- When ALL is selected with a date, up to 10 pull lists for that date will be displayed and then the user is allowed to <^>. If the user enters <^>, no more pull lists will be displayed but the printing will continue.

MANAGEMENT REPORTS MENU

Retrieval Rate Statistics

Retrieval rates may be sorted by division and clinic. Clinic sorts will give totals by clinic.

System Definition, set-up

SYSTEM DEFINITION MENU

Application Set-up

Clinic Initialization Request Parameters

EXCLUDE INPATIENTS: (Y/N)

If set to YES, inpatients with clinic appointments will not appear on clinic pull lists.

Select EXCLUDE APPOINTMENT TYPES:

Any appointment type in the APPOINTMENT TYPE file (#409.1) may be selected, and appointments for these types will not appear on clinic pull lists.

CREATE RECORDS-CLINIC REQUESTS: (Y/N)

If set to NO, a request, pull list, and record will NOT be created if a clinic appointment is made and there is no record for the patient.

DEFAULT SCHEDULED ADMISSIONS: (a BORROWER/FILE AREAS entry)

If this field contains a borrower, the Clinic Initializer will create a pull list from entries in the SCHEDULED ADMISSION file. Any entry in the SCHEDULED ADMISSION file that does NOT have a corresponding ward or treating specialty in the BORROWERS file will appear on this borrowers pull list. (see Borrower Set-up)

Record Retirement Parameters

DEFAULT RETIREMENT BORROWER:

When charging out record retirement pull lists, this borrower will be prompted as the borrower when records are charged.

DEFAULT PERPETUAL RECORD:

Defining this record will allow perpetual records to be created for each patient when charging out record retirement pull lists.

Borrower Set-up

Scheduled Admissions Clinic Initialization Parameters

SCHEDULED ADMISSIONS BORROWER: (Ward Location Borrower)

If an entry in the SCHEDULED ADMISSION file has a type WARD and the ward location matches this ward location borrower, a pull list will be created for this ward location borrower or associated borrower.

TREATING SPECIALTY: (any BORROWER/FILE AREAS entry)

If an entry in the SCHEDULED ADMISSION file has a type TREATING SPECIALTY and the treating specialty matches this borrower's treating specialty, then a pull list will be created for this borrower or associated borrower.

To summarize, pull lists can be created for entries in the SCHEDULED ADMISSION file if there is a DEFAULT SCHEDULED ADMISSIONS, and/or a SCHEDULED ADMISSIONS BORROWER, and/or a TREATING SPECIALTY BORROWER. If only a DEFAULT SCHEDULED ADMISSIONS is entered, all scheduled admissions entries will be put on a pull list for this borrower. If none are entered, no scheduled admissions pull lists will be created.

Type of Record Set-up

Cutoff/Purge Parameters

BARCODE RENEWAL CUTOFF (days):

This value is used to determine if new barcodes should be printed with pull lists. The "date barcode last printed" is compared with this value and a new barcode is printed if it is "old".

PENDING CHECK-IN CUTOFF (days):

If set to 0, a record with a pending request is not flagged on check-in.

If set to 1, a record with a pending request for "today" is flagged.

If set to 2, a record with a pending request for "today" or "tomorrow" is flagged, etc.

If not set, records with pending requests are flagged depending on the PENDING REQUEST CUTOFF (the same function as in v1.26).

RETIRE RECORD CUTOFF (days):

When record retirement pull lists are generated, records with no activity for this amount of time are added to the pull lists.

Movement Type Set-up

Movement types may not be deleted.

Computer Site Manager

COMPUTER SITE MANAGER'S MENU

Application Set-up (Site Mgr)

Miscellaneous Parameters

CANCELLATION BULLETIN: (nothing, bulletin, device, both)

When a record request is canceled, the file room may be notified by a cancellation bulletin to a mail group, printing the bulletin on the file room's request printer, or both.

CANCELLATION MAIL GROUP:

If CANCELLATION BULLETIN is selected, the bulletin will be sent to this mail group.

TERMINATED BORROWERS: (Y/N)

If this is set to YES and a user is terminated on the system, the borrowing privileges will be revoked for that user when the Clinic Request Initialization Task runs at night.

CANCEL REQUESTS: (Y/N)

If TERMINATED BORROWERS is set to YES and this parameter is set to YES, all requests for records by the terminated borrower will be canceled when the Clinic Request Initialization Task runs at night.

File Room Set-up (Site Mgr)

CRT's Assigned to this File Room

Select INPUT DEVICES:

Assigning input devices by file room allows file rooms to be assigned on entry to Record Tracking Menus without requiring user selection. This function now includes virtual devices - i.e., DECservers. When entering Record Tracking options, the value of IO("ZIO") is used as a DEVICE file name to see if there is a matching entry in the INPUT DEVICES for a file room and if there is, that file room is selected by the system. If there are multiple file rooms, the INPUT DEVICES must have unique entries.

The following is an example of two DEVICE file entries which are used as INPUT DEVICES for file room lookup. Note that the fields of the generic LTA device are still active; the INPUT DEVICES are just used for file room lookup.

```
NAME: DSV4/LC-2-6                $I: _LTA
ASK DEVICE: YES                  ASK PARAMETERS: YES
LOCATION OF TERMINAL: RECORD TRACKING MAIN FILE ROOM
MARGIN WIDTH: 80
FORM FEED: #, *27, *91, *50, *74, *27, *91, *102, *12
PAGE LENGTH: 24                 BACK SPACE: $C(8)
SUBTYPE: C-VT220-DOWN          TYPE: VIRTUAL TERMINAL
```

```
NAME: DSV2/LC-2-1                $I: _LTA
ASK DEVICE: YES                  ASK PARAMETERS: YES
LOCATION OF TERMINAL: RECORD TRACKING OUTPATIENT FILE RM
MARGIN WIDTH: 80
FORM FEED: #, *27, *91, *50, *74, *27, *91, *102, *12
PAGE LENGTH: 24                 BACK SPACE: $C(8)
SUBTYPE: C-VT220-DOWN          TYPE: VIRTUAL TERMINAL
```

```
NAME: GENERIC LTA                $I: _LTA
ASK DEVICE: YES                  ASK PARAMETERS: YES
SIGN-ON/SYSTEM DEVICE: YES      LOCATION OF TERMINAL: LAT
MARGIN WIDTH: 80
FORM FEED: #, *27, *91, *50, *74, *27, *91, *102
PAGE LENGTH: 24                 BACK SPACE: $C(8)
SUBTYPE: C-VT220                TYPE: VIRTUAL TERMINAL
```

On systems with configurations where device selection is by contention, devices cannot be associated with file rooms. When entering Record Tracking file room options, the default answer to the following question has been changed to YES.

```
Do you wish to use the file room's default devices? YES//
```

File Room/Remote Set-up (Site Mgr)

When a request for a record from another VAMC is generated, a bulletin will be sent by network mail to that site using the domain, request notice printer and/or remote mail group for that site. This information is entered here so the user cannot make a mistake. A profile of previously entered sites is displayed initially for reference. A group of sites that routinely transfer records might find it convenient to define a set of common device and mail group names to ease management, such as RT REQUEST PRINTER, RT REQUEST GROUP.

DOMAIN:

This is the valid DOMAIN file entry for that site.

REQUEST NOTICE PRINTER:

This must be the file room request printer at the remote site. It must be a valid entry in their DEVICE file. If not present, the bulletin will not print on their printer.

REMOTE MAIL GROUP:

This must be a mail group at the remote site. If not present, the bulletin will not be sent to the group. If both the mail group and printer are defined, the bulletin will be sent to both. If neither is defined, the bulletin will not be sent although the bulletin will be delivered locally to the user who makes the request.

MAIL ROUTING SYMBOL:

This is the standard mail routing symbol. It is not used by network mail but is included for use with non-electronic mail.

Re-Compile Templates

This option will re-compile the cross-reference templates in addition to the input and print templates used by FileMan. Input and print templates have the name space RTC*. Cross-reference templates have the name space RTX* and are as follows:

RECORDS	#190	RTXR*
REQUESTED RECORDS	#190.1	RTXQ*
RECORD MOVEMENT HISTORY	#190.3	RTXM*
PULL LIST	#194.2	RTXP*
BORROWERS/FILE AREAS	#195.9	RTXB*

Compiled cross-reference routines should significantly improve the overall performance of the package. Routine mapping is advised depending on memory availability and RTHIST indication.

Record Tracking System Overall Parameters

Parameters Used By All Applications

INSTITUTION/STATION NUMBER:

This is the station number of the site. The previous version used the value of ^DD("SITE"). It has been advised that this value can be volatile and should not be used as a reference. When the INSTITUTION/STATION NUMBER is selected it should never be changed, as this value is encoded in the barcodes for all records in the system.

General Information

Sort Global

Record Tracking uses the global ^UTILITY("RTDPTSORT" for generating record retirement pull lists by terminal digits. The computer site manager's Initialization Menu has an option to create or delete this global. It should be created on all systems accessed by file room users and on systems where the TaskMan runs. It can be deleted and recreated at any time. It can also be copied from one system to another with a global copy utility. The sort global will require about 2000 blocks/100,000 patients. If this space is not available on all systems, the following procedure can be used.

The Generate Record Retirement Pull lists option checks for the global nodes ^UTILITY("RTDPTSORT","START"), ^UTILITY("RTDPTSORT","FINISH") before allowing a user to generate record retirement pull lists by terminal digits. These nodes can be manually set to null to allow users to proceed. The user will then have to queue the job so the TaskMan can access the sort global where it runs.

File Room Keys

Record Tracking makes limited use of security keys; mainly for screening access to file rooms which have security keys. When setting up Record Tracking applications or file rooms, the ADPAC will need to have the appropriate keys for the application.

Response Time Monitor Entries

RTDPA1 This measures the time required to create a new record and associated movement.

RTSM6 This measures the time required to run the automatic clinic request initialization task.

