Update _2_0_193

Clinical Reminders

VA-OSP TH INTAKE ASSESSMENT
Install Guide

March 2021

Product Development
Office of Information Technology
Department of Veterans Affairs

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Introduction

The Suicide Prevention Telehealth Interfacility Consult (IFC) and Intake Assessment template were developed by the Veterans Health Administration Office of Mental Health and Suicide Prevention (OMHSP) in collaboration with subject matter experts within the SP 2.0 Clinical Telehealth Workgroup. These notes were designed to create a referral system within the Veterans Integrated Service Network (VISN) Clinical Resource Hubs (CRH) for Veterans with a history of suicidal self-directed violence to receive suicide-prevention psychotherapy interventions via telehealth.

Referring providers (LIPs) located in spoke telehealth facilities from general mental health, specialty mental health, residential mental health and inpatient mental health will complete the referring IFC. Suicide Prevention Telehealth psychiatrists, psychologists, social workers and licensed professional mental health counselors located in the HUB site of the Clinical Resource Hubs will receive and respond to the consults using the Intake Assessment Template. The purpose of the templates is to use health factors to capture data, accurately track wait times and collect information about the referral sources and triage responses.

UPDATE_2_0_193 contains 1 Reminder Exchange entry:
UPDATE_2_0_193 VA-OSP TH INTAKE ASSESSMENT

The exchange file contains the following components:

REMINDER GENERAL FINDINGS
VIEW PROGRESS NOTE TEXT

TIU TEMPLATE FIELD
WP 3/70
DISPLAY TEXT SP OTHER LOCATION
EB 20/240
DATE & TIME

HEALTH FACTORS
VA-REMINDER UPDATES
VA-UPDATE_2_0_193
VA-OSP TH INTAKE ASSESSMENT
VA-OSP TH NOT REC OTHER
VA-OSP TH NOT REC NOT INDICATED
VA-OSP TH NOT REC INCLUSION
VA-OSP TH NOT REC RECEIVING TX
VA-OSP TH NOT REC DIFFERENT ISSUE
VA-OSP TH DECLINED OTHER
VA-OSP TH DECLINED NOT MAIN CONCERN
VA-OSP TH DECLINED DISCUSS SUICIDE

VA-OSP TH DECLINED VIRTUAL
VA-OSP TH DECLINED MOTIVATION
VA-OSP TH DECLINED ATTENDANCE
VA-SUICIDE SAFETY PLAN
VA-SP SAFETY PLAN REVIEWED
VA-OSP TH SAFETY PLAN UPDATED
VA-OSP TH SAFETY PLAN NEW
VA-OSP TH PST-SP CONSENTED
VA-OSP TH DBT CONSENTED
VA-OSP TH CBT-SP CONSENTED
VA-OSP TH SAFETY PLANNING CONSENTED
VA-OSP TH PST-SP DISCUSSED
VA-OSP TH DBT DISCUSSED
VA-OSP TH CBT-SP DISCUSSED
VA-OSP TH SAFETY PLANNING DISCUSSED
VA-SUICIDE RISK EVALUATION TYPE [C]
VA-SUICIDE RISK UPDATE EVALUATION
VA-SUICIDE RISK NEW EVALUATION
VA-OSP TH FACE TO FACE
VA-OSP TH TELEPHONE
VA-OSP TH SESSION PARTIALLY VIDEO
VA-OSP TH SESSION ENTIRELY VIDEO
VA-OSP TH VIDEO TO ATLAS
VA-OSP TH VIDEO TO CLINIC
VA-OSP TH VA DEVICE NO
VA-OSP TH VA DEVICE YES
VA-OSP TH VIDEO TO HOME OUTSIDE
VA-OSP TH VIDEO TO HOME RESIDENCE
VA-OSP TH REFERRAL OTHER
VA-OSP TH REFERRAL MH SPECIALTY
VA-OSP TH REFERRAL INPATIENT
VA-OSP TH REFERRAL RRTP
VA-OSP TH REFERRAL SP TEAM
VA-OSP TH REFERRAL PCMHI
VA-OSP TH REFERRAL MHC/BHIP
VA-OSP TH INTAKE ASSESSMENT NOTE

REMINDER SPONSOR
VHA Office of Mental Health and Suicide Prevention

REMINDER TERM
VA-REMINDER UPDATE_2_0_193

HEALTH SUMMARY TYPE
VA-CSRE MOST RECENT NOTE
VA-CSRE MOST RECENT

HEALTH SUMMARY OBJECTS
  VA-CSRE MOST RECENT NOTE
  VA-CSRE MOST RECENT

TIU DOCUMENT DEFINTION
  VA-CSRE MOST RECENT NOTE
  VA-CSRE MOST RECENT

REMINDER DIALOG
  VA-OSP TH INTAKE

Install Details

This update is being distributed as a web host file. The address for the host file is:
https://REDACTED /UPDATE_2_0_193.PRD
The file will be installed using Reminder Exchange, programmer access is not required.

Installation:
===============
This update can be loaded with users on the system. Installation will take less than 15 minutes.

Install Example

To Load the Web Host File. Navigate to Reminder exchange in Vista

At the **Select Action:** prompt, enter **LWH** for Load Web Host File
At the **Input the url for the .prd file:** prompt, type the following web address:
https://REDACTED /UPDATE_2_0_193.PRD
You should see a message at the top of your screen that the file successfully loaded.

Search and locate an entry titled **UPDATE_2_0_193 VA-OSP TH INTAKE ASSESSMENT** in reminder exchange.

```
+Item  Entry                        Source            Date Packed
 262  UPDATE_2_0_193 VA-OSP TH                        03/19/2021@09:25
      INTAKE ASSESSMENT
 263  UPDATE_2_0_1_1 BENEFICIARY                       11/20/2015@09:45
      TRAVEL/EBOLA UPDATE
 264  UPDATE_2_0_2 CAREGIVER ELIG                      02/18/2016@13:10
 265  UPDATE_2_0_20 BREAST CANCER                      02/06/2017@12:19
      DIALOGS
 266  UPDATE_2_0_20 COLON CANCER                       02/07/2017@09:19
      DIALOGS
 267  UPDATE_2_0_20 LUNG CANCER                        02/06/2017@12:23
+           + Next Screen   - Prev Screen   ?? More Actions          >>>
CFE  Create Exchange File Entry     LHF  Load Host File
CHF  Create Host File               LMM  Load MailMan Message
CMM  Create MailMan Message         LR   List Reminder Definitions
DFE  Delete Exchange File Entry     LWH  Load Web Host File
IFE  Install Exchange File Entry    RI   Reminder Definition Inquiry
IH   Installation History           RP   Repack
Select Action: Next Screen// IFE   Install Exchange File Entry
Enter a list or range of numbers (1-506): 262
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry UPDATE_2_0_193 VA-OSP TH
INTAKE ASSESSMENT *(in this example it is entry 262. It will vary by site).* The date of
the exchange file should be 03/19/2021@09:25.

```
        Component                              Category    Exists
Source:
Date Packed: 03/19/2021@09:25:05
Package Version: 2.0P46

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-OSP TH INTAKE


REMINDER TERM
  VA-REMINDER UPDATE_2_0_193


Keywords:


Components:

+           Enter ?? for more actions                                >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.
Select Action: Next Screen// IA   Install all Components
You will see several prompts, for all new entries you will choose **I to Install**

For components that already exists but the packed component is different, choose **S to Skip.**

You will be promped to install the reminder dialog component (VA-OSP TH INTAKE). You will choose to install all even though some components may have an X to indicate that they exist.

```
Packed reminder dialog: VA-OSP TH INTAKE [NATIONAL DIALOG]

 Item  Seq. Dialog Findings                                 Type      Exists
   1     VA-OSP TH INTAKE                                    dialog

   2    10 VA-GP OSP TH CONSULT RESULT                       group
           Finding: VA-OSP TH CONSULT RESULT (HEALTH FACTOR)             X
   3    10.10 VA-OSP TH CONSULT DATE TIME                    element
           Finding: *NONE*
   4    10.20 VA-GP OSP TH CONSULT CHART REVIEW              group
           Finding: *NONE*
   5    10.20.10 VA-OSP TH CONSULT CHART REVIEW              element
           Finding: *NONE*
   6    10.30 VA-GP OSP TH CONSULT VERIFY ID                 group
           Finding: *NONE*
   7    10.30.10 VA-OSP TH CONSULT VERIFY ID                 element
           Finding: *NONE*
   8    10.40 VA-GP OSP TH CONSULT REFERRING PROGRAM         group
+          + Next Screen    - Prev Screen    ?? More Actions
DD    Dialog Details      DT   Dialog Text         IS    Install Selected
DF    Dialog Findings     DU   Dialog Usage        QU    Quit
DS    Dialog Summary      IA   Install All
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** to install the dialog: **VA-OSP TH INTAKE**
Select Action: Next Screen// IA   Install All
Install reminder dialog and all components with no further changes: Y// Yes

```
Packed reminder dialog: VA-OSP TH INTAKE [NATIONAL DIALOG]
VA-OSP TH INTAKE (reminder dialog) installed from exchange file.
 Item  Seq. Dialog Findings                                 Type      Exists
   1     VA-OSP TH INTAKE                                    dialog     X

   2    10 VA-GP OSP TH CONSULT RESULT                       group     X
           Finding: VA-OSP TH CONSULT RESULT (HEALTH FACTOR)            X
   3    10.10 VA-OSP TH CONSULT DATE TIME                    element    X
           Finding: *NONE*
   4    10.20 VA-GP OSP TH CONSULT CHART REVIEW              group     X
           Finding: *NONE*
   5    10.20.10 VA-OSP TH CONSULT CHART REVIEW              element    X
           Finding: *NONE*
   6    10.30 VA-GP OSP TH CONSULT VERIFY ID                 group     X
           Finding: *NONE*
   7    10.30.10 VA-OSP TH CONSULT VERIFY ID                 element    X
           Finding: *NONE*
   8    10.40 VA-GP OSP TH CONSULT REFERRING PROGRAM         group     X
+          + Next Screen    - Prev Screen    ?? More Actions
DD    Dialog Details      DT   Dialog Text         IS    Install Selected
DF    Dialog Findings     DU   Dialog Usage        QU    Quit
DS    Dialog Summary      IA   Install All
Select Action: Next Screen// Q
```

After completing this dialog install, you will type Q.

```
      Component                                      Category   Exists
Source:
Date Packed: 03/19/2021@09:25:05
Package Version: 2.0P46

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-OSP TH INTAKE


REMINDER TERM
  VA-REMINDER UPDATE_2_0_193


Keywords:


Components:


+          + Next Screen   - Prev Screen   ?? More Actions          >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// Q
```

You will then be returned to this screen. At the **Select Action** prompt, type **Q.**

Install complete.

Post Installation

1. **Make the Dialog template available to be attached to a Personal or Shared template or to be able to attach the dialog to a progress note title.**

   Select Reminder Managers Menu <TEST ACCOUNT> Option: **CP CPRS Reminder Configuration**

   CA   Add/Edit Reminder Categories
   CL   CPRS Lookup Categories
   CS   CPRS Cover Sheet Reminder List
   MH   Mental Health Dialogs Active
   PN   Progress Note Headers
   RA   Reminder GUI Resolution Active
   TIU   TIU Template Reminder Dialog Parameter
   DEVL   Evaluate Coversheet List on Dialog Finish
   DL   Default Outside Location
   PT   Position Reminder Text at Cursor
   LINK   Link Reminder Dialog to Template
   TEST   CPRS Coversheet Time Test
   NP   New Reminder Parameters
   GEC   GEC Status Check Active

```
    WH     WH Print Now Active
```
Select CPRS Reminder Configuration <TEST ACCOUNT> Option: ==TIU TIU==
==Template Reminder Dialog Parameter==

Reminder Dialogs allowed as Templates may be set for the following:

```
    1   User        USR    [choose from NEW PERSON]
    3   Service      SRV    [choose from SERVICE/SECTION]
    4   Division     DIV    [SALT LAKE CITY]
    5   System       SYS    [NATREM.FO-SLC.MED.VA.GOV]
```

Enter selection: ==5== *Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level.*

Setting Reminder Dialogs allowed as Templates for System: NATREM.FO-SLC.MED.VA.GOV
Select Display Sequence: ==?==

```
388            VA-COVID-19 TELEPHONE FOLLOW-UP
389            VA-SRA-CONSULT RESPONSE (D)
```

==*When you type a question mark above, you will see the list of #'s (with dialogs) that are already taken. Choose a number **NOT** on this list. For this example, 390 is not present so I will use 390.*==

Select Display Sequence: ==390==
Are you adding 390 as a new Display Sequence? Yes// ==YES==

Display Sequence: 390// ==<Enter>==   390
Clinical Reminder Dialog: **VA-OSP TH INTAKE**   reminder dialog   NATIONAL
```
    ...OK? Yes// <Enter>  (Yes)
```

2. **Setup of Note Title.**

   The note title to create to associate with this template is:
   SUICIDE PREVENTION TELEHEALTH INTAKE ASSESSMENT

   Note: The note title does not contain the word 'consult' to maintain uniformity across intra- and interfacility referrals.

   Note: Comprehensive information on Creating new Document Classes and Titles can be found beginning on page 54 of the TIU/ASU Implementation Guide at the following link: http://www.va.gov/vdl/documents/Clinical/CPRS-Text_Integration_Utility_(TIU)/tiuim.pdf

   a. CRH host site setup (if your facility supports or is integrated with a CRH):
      VHA Enterprise Standard Title: **TELEHEALTH CONSULT**

You can add this to your CONSULTS document class.

b. Spoke site setup:

VHA Enterprise Standard Title: **MENTAL HEALTH TELEHEALTH NOTE**

You can add this to the document class containing your psychology note titles. Do *not* add this to your CONSULTS document class because the IFC will be completed by CRH staff using a separate pointer note within the CRH host site VistA instance.

Note: *The pointer note documentation process is further described on page 27 of the Clinical Resource Hub Operations Manual at the following link:* REDACTED
Note: *This is an internal website that is not available to the public.*

3. **Add your local data objects.**
   Add your local data objects for patient address and patient phone numbers to the dialog text of the following reminder dialog elements:

   a. VAL-OSP TH INTAKE EMERGENCY INFO VTH PHONE
   b. VAL-OSP TH INTAKE EMERGENCY INFO VTH PT LOCATION HOME

   Using the menu Reminder Dialog Management, Reminder Dialogs, change your view to Elements.

   Dialog List   Mar 03, 2021@08:30:32   Page: 1 of   35
   REMINDER VIEW (ALL REMINDERS BY NAME)

    Item Reminder Name   Linked Dialog Name & Dialog Status

   +   Enter ?? for more actions   >>>
   AR   All reminders   LR   Linked Reminders   QU   Quit
   CV   Change View   RN   Name/Print Name
   Select Item: Next Screen// **CV**   Change View *<Enter>*

          Select one of the following:

             D   Reminder Dialogs
             E   Dialog Elements
             F   Forced Values
             G   Dialog Groups

```
        P       Additional Prompts
        R       Reminders
        RG       Result Group (Mental Health)
        RE       Result Element (Mental Health)
```

TYPE OF VIEW: R// **E** *<Enter>*

*Next, type **SL** for search, press **<Enter>**, then search for **VAL-OSP TH INTAKE** **EMERGENCY INFO**.*


```
+        + Next Screen   - Prev Screen   ?? More Actions                >>>
AD   Add              PT  List/Print All     QU   Quit
CO   Copy Dialog          INQ  Inquiry/Print
CV   Change View          TE   Dialog Taxonomy Edit
Select Item: Next Screen// SL <Enter>
Search for: VAL-OSP TH INTAKE EMERGENCY INFO <Enter>
...searching for 'VAL-OSP TH INTAKE EMERGENCY INFO'
```

Dialog List   Mar 03, 2021@08:49:59   Page: 1973 of 2012
DIALOG VIEW (DIALOG ELEMENTS)


```
+Item Dialog Name                     Dialog type        Status
27615  VAL-OSP TH INTAKE EMERGENCY INFO VTH P Dialog Element
27616  VAL-OSP TH INTAKE EMERGENCY INFO VTH P Dialog Element
+        + Next Screen   - Prev Screen   ?? More Actions                >>>
```

Find Next 'VAL-OSP TH INTAKE EMERGENCY INFO'? Yes// **NO** *<Enter>*

After searching, you will see the sequence number for the elements in the left column. In this example, I am selecting 27615.

Select Item: Next Screen// **27615** *<Enter>*

Dialog Name: VAL-OSP TH INTAKE EMERGENCY INFO VTH PHONE

Current dialog element/group name: VAL-OSP TH INTAKE EMERGENCY INFO VTH PHONE
Used by: VA-GP OSP TH INTAKE EMERGENCY INFO VTH PHONE (Dialog Group)

NAME: VAL-OSP TH INTAKE EMERGENCY INFO VTH PHONE
        Replace   *<Enter>*
DISABLE: *<Enter>*
CLASS: LOCAL//   *<Enter>*
SPONSOR: VHA Office of Mental Health and Suicide Prevention
        // *<Enter>*

REVIEW DATE: <Enter>
RESOLUTION TYPE: <Enter>
ORDERABLE ITEM: <Enter>
FINDING ITEM: <Enter>

Additional findings: none   <Enter>
Select ADDITIONAL FINDING: <Enter>
DIALOG/PROGRESS NOTE TEXT:
Phone: **INSERT PATIENT PHONE OBJECT**

   Edit? NO// YES <Enter>

Add your local data object, then repeat the steps as needed to add your local data object for patient address to the remaining element VAL-OSP TH INTAKE EMERGENCY INFO VTH PT LOCATION HOME.

4. **Add formatting to general findings view progress note text button.**

Following the steps outlined previously, search for and select the following reminder dialog element:

   a. VAL-OSP TH INTAKE CSRE DISPLAY

Once selected, cycle through the prompts then add the following highlighted formatting text to the alternate progress note text field:

   'FMT{|VA-CSRE MOST RECENT NOTE|**}FMT**

   Dialog Name: VAL-OSP TH INTAKE CSRE DISPLAY

   Current dialog element/group name: VAL-OSP TH INTAKE CSRE DISPLAY
   Used by: VA-GP OSP TH INTAKE RESULT (Dialog Group)

   NAME: VAL-OSP TH INTAKE CSRE DISPLAY Replace   <Enter>
   DISABLE: <Enter>
   CLASS: LOCAL//   <Enter>
   SPONSOR: VHA Office of Mental Health and Suicide Prevention
        //   <Enter>
   REVIEW DATE: <Enter>
   RESOLUTION TYPE: <Enter>
   ORDERABLE ITEM: <Enter>
   Finding item: GF VIEW PROGRESS NOTE TEXT   <Enter>
   FINDING ITEM: VIEW PROGRESS NOTE TEXT//   <Enter>

Additional findings: none   *<Enter>*
Select ADDITIONAL FINDING: *<Enter>*
DIALOG/PROGRESS NOTE TEXT:
|VA-CSRE MOST RECENT|

  Edit? NO//   *<Enter>*
ALTERNATE PROGRESS NOTE TEXT:
'FMT{|VA-CSRE MOST RECENT NOTE|}FMT

  Edit? NO// **YES** *<Enter>*

==[WRAP]==[INSERT]=====< ALTERNATE PROGRESS NOTE T[Press
<PF1>H for help]====
'FMT{|VA-CSRE MOST RECENT NOTE|**}FMT**

<=======T=======T=======T=======T=======T=======T=======T======

EXCLUDE FROM PROGRESS NOTE: YES//   *<Enter>*
SUPPRESS CHECKBOX: SUPPRESS//   *<Enter>*
Select SEQUENCE: 10//   *<Enter>*
  SEQUENCE: 10//   *<Enter>*
  ADDITIONAL PROMPT/FORCED VALUE: PXRM GF VIEW BUTTON
      //   *<Enter>*
  OVERRIDE PROMPT CAPTION: Click here to read CSRE note
      Replace   *<Enter>*
  START NEW LINE: YES//   *<Enter>*
  EXCLUDE FROM PN TEXT: YES//   *<Enter>*
  REQUIRED: *<Enter>*
  DISABLE PROMPT: *<Enter>*
Select SEQUENCE: *<Enter>*
Select BRANCHING LOGIC SEQUENCE: *<Enter>*
Checking reminder dialog for errors..

The dialog element VAL-OSP TH INTAKE CSRE DISPLAY contains a reference to
a TIU Template field 'FMT{|VA-CSRE MOST RECENT NOTE| in the Alternate
Progress Note Text field. This TIU Template field does not exist on the
system.

  *Note: You will receive the above error message when the reminder dialog checks
  for errors. This may be ignored.*

5. **Update Health Summary Type VA-CSRE MOST RECENT NOTE by adding your
   local note title used for SUICIDE RISK EVALUATION-COMPREHENSIVE.**

    1   Patient Health Summary

2   Ad Hoc Health Summary
        3   Range of Dates Patient Health Summary
        4   Visit Patient Health Summary
        5   Hospital Location Health Summary
        6   Information Menu ...
        7   Create/Modify Health Summary Type
        8   Delete Health Summary Type
        9   CPRS Reports Tab 'Health Summary Types List' Menu ...

Select Health Summary Enhanced Menu <TEST ACCOUNT> Option: 7
Create/Modify Heal
th Summary Type

Select Health Summary Type: VA-CSRE MOST RECENT NOTE VA-CSRE MOST
RECENT NOTE

  VA-Csre most Recent note (Csre most Recent note)

  OK? YES// YES

WARNING: You are about to edit a Health Summary Type that is being used
by a Health Summary Object. Changing the structure of this Health Summary
Type will alter how the Object will display.

Do want to continue? NO// YES
 NAME: VA-CSRE MOST RECENT NOTE Replace   <Enter>
TITLE: CSRE Most Recent Note Replace   <Enter>
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes//   <Enter>
SUPPRESS SENSITIVE PRINT DATA: <Enter>

Do you wish to review the Summary Type structure before continuing? NO// YES

                HEALTH SUMMARY TYPE INQUIRY

     Type Name: VA-CSRE MOST RECENT NOTE
        Title: CSRE Most Recent Note
        Owner:
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes
SUPPRESS SENSITIVE PRINT DATA:

                        Max   Hos ICD Pro CPT
Abb Ord   Component Name   Occ Time Loc Text Nar Mod Selection
----

          * = Disabled Components
Select COMPONENT: SPN PROGRESS NOTES SELECTED SPN

SUMMARY ORDER: 5// 5   *<Enter>*
OCCURRENCE LIMIT: 1//   *<Enter>*
TIME LIMIT: *<Enter>*
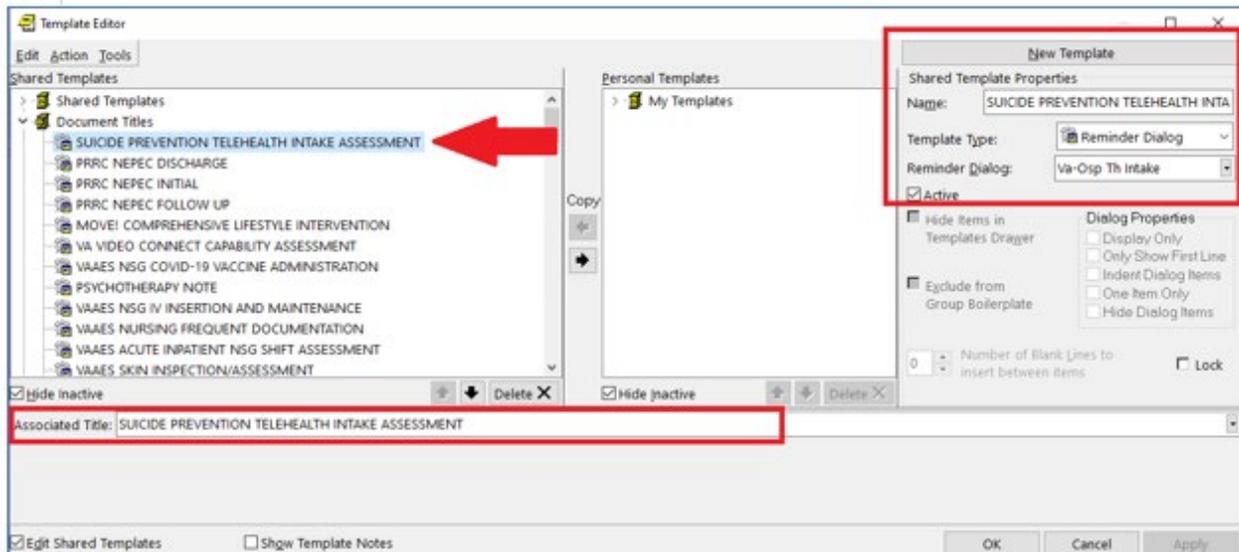HEADER NAME: Selected Prog Notes//   *<Enter>*

No selection items chosen.

Select new items one at a time in the sequence you want them displayed.
You may select any number of items.

Select SELECTION ITEM: **Add your note title here**

6. **Associate the reminder dialog with the note title in CPRS**

In CPRS, open the Template Editor, expand Document Titles, select the appropriate folder (if applicable), then click New Template (top right-hand corner).

Type in the following information:
    Name: **SUICIDE PREVENTION TELEHEALTH INTAKE ASSESSMENT**
    Template Type: **Reminder Dialog**
    Reminder Dialog: **VA-OSP TH INTAKE**

Next, type in the Associated Title name – **SUICIDE PREVENTION TELEHEALTH INTAKE ASSESSMENT** – then click Apply.