VistA Scheduling Enhancements (VSE)

VS GUI
Installation Guide
Version 2.0

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Department of Veterans Affairs
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Revision History

Date	Version	Description	Author
04/11/2017	2.0	Updated Section 1.4 and added Patch Information Table	VSE PMO
02/09/2017	2.0	Updated the SCCM Build Document Links	VSE PMO
01/06/2017	2.0	Incorporated VA feedback.	D. Vick E. Phelps
12/22/2016	1.1	Updated for VSE Additional Enhancements: Added patch numbers to section 1.5; replaced Figure 1 Log In Screen. Technical edit.	W. Gibbons E. Phelps
05/04/2016	1.01	Removed Manual Install Instruction. Link to SCCM package was added. All vista patches associated with this release have been documented in the guide, along with the installation order.	D. Reed
05/01/2016	1.0	Initial Baseline	D. Reed

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1. Getting Started

This section provides an overview of the VistA security keys, VistA server requirements, the client PC requirements and the process for acquiring the GUI software.

1.1. General Information

It is recommended that the terminal output during the installation be captured using an auxport printer attached to the terminal at which software installation is being performed. This provides a printed audit trail if any problems should arise.

1.2. VistA Server Requirements

- Cache version 5.0
- Kernel version 8
- Patient Information Management System (PIMS) version 5.3 patch 1012

1.3. Client PC Requirements

- Microsoft Windows XP or Windows 7
- Microsoft .NET Framework 4.0
- Microsoft Data Access Components (MDAC) current version

1.4. Installation Issues

There are no installation issues to report. However, patches must be installed in this order **prior to installation of the GUI**:

GMRC*3.0*83
SD*5.3*627
SD*5.3*628
SD*5.3*643
SD*5.3*642
SD*5.3*645
GMRC*3.0*86
SD*5.3*651
SD*5.3*658
MBAA*1*4

Once Patch SD*5.3*628 is installed and the Post Install has started, please do the steps listed below:

- Stop/Terminate the Taskman job that is started by the Patch 628 Post Install
- Unschedule the daily Taskman job (SDEC REPORT DATA) that is scheduled by the Patch 628 Post Install
- Disable the option to manually start SDEC REPORT DATA.

Production Release 1.1 Patch Information

Patch	Summary	Compliance Date	Additional concerns
GMRC*3.0*83  GMRC_3_83 VS GUI Consult.docx	Consult support fixes for VS GUI	May 5, 2017	GMRC*3.0*83 MUST BE INSTALLED BEFORE SD*5.3*627. This patch should not be installed with users on the system and it is recommended that it be installed during non-peak hours **Average Install Time at IOC sites:** The installation time will vary from site to site depending on the size of file #123. The duration depends on several factors including the Operating System (VMS/Linux), Hardware Configuration and the number of records stored in REQUEST/CONSULTATION files (#123). The team collected data from 24 sites and the median install time was 88 minutes**. Two sites reported install times over 50 hours however those sites had over 40 million records in File #123 and ran on VMS. If your site has a high number of records in File #123, runs on VMS and/or has a hardware configuration that shares resources with other instances it is recommended that these patches be installed during off-peak hours or over a weekend. During installation it is recommended that consults be disabled; however, it is not required.**
SD*5.3*627  SD_5.3_627 VS GUI Initial Patch.docx	Initial Patch for VS GUI (creating new files and pointers)	May 5, 2017	**Issue 1:** A Post-Install error may occur if an appointment has been made that does not have a clinic defined. **Recommendation:** The Query below should be run prior to install of patch 627. User should set their terminal to be 132 characters wide. Note that FileMan will return all of the appointment entries for a patient even if only 1 of them matches the search criteria. When the search completes, if your site finds records where the CLINIC column shows the IEN (without a clinic name), Option #1 – IT needs to enter a clinic name – example MISSING CLINIC 'IEN' Option #2 – enter a CA Ticket Suggested Patch 627 Fileman Report  Suggested Patch 627 Fileman Report.docx **Issue 2:** When installing SD*5.3*627, the installer validates the integrity of the cross-references the application uses. If the cross-reference is corrupt, missing or invalid for any reason, the install captures this information for output at the end of installation. The output then can be used by the site to determine if they need to clean up their data. At one site, the number of data issues caused the list to use

			up the entire RAM which is causing the installation process to crash. Based on the error log, the team determined the "AB" cross-reference in File #200 may be the main culprit. **Recommendation:** recommend that the "AB" index of File #200 be re-indexed and the patch reinstalled to see if that solves the problem. **Issue 3:** An IOC site had a bad node in the Patient file causing the error. The DPT(4,"S") node is defined for a patient that has no DPT(4,0) node defined causing the error. **Recommendation:** The IOC site killed bad global nodes in DPT and restarted the post-init routine. The error is coming from the Patient file, the node should killed if no other patient data is present.
SD*5.3*628  SD_5.3_628 VS GUI Resource Mgmt.docx	Initial Patch for VS GUI Reports	May 5, 2017	**The Average Install Time of the patch is approximately 5 minutes or less** **Once Patch SD*5.3*628 is installed and the Post Install has started, please do the steps listed below:** **Stop/Terminate the Taskman job that is started by the Patch 628 Post Install** **Unschedule the daily Taskman job (SDEC REPORT DATA) that is scheduled by the Patch 628 Post Install** **Disable the option to manually start SDEC REPORT DATA.** This patch contains server functionality to perform the following tasks: 1) Extract appointment and encounter data from VistA Scheduling. 2) Aggregate extracted data for a specified date range. 3) Format the aggregated data in a predefined XML schema. 4) Send the XML data to a requesting application through the RPC Broker.
SD*5.3*643  SD_5.3_643 VSE Recall Reminder ENH.	5 Recall Reminder Enhancements	May 5, 2017	**Pre-Install (a request has gone out to all MC (PAS ADPAC) to run this prior to release)-** Every site using Recall Reminder must validate that all of the clinics using the application are in the RECALL REMINDER LETTERS file (#403.52). It is recommended that this task be accomplished prior to installing SD*5.3*643 to eliminate any problems with adding Recall Reminders. A FileMan routine that will return a list of all Recall Reminder clinics that currently have pending Recall entries is attached. Patch SD*643 Clarifaction  Patch SD_643 clarification.docx **Average Install Time at IOC sites:**

			Install time should be 5 minutes or less. ********** **PLEASE TAKE NOTE OF THE FOLLOWING KNOWN ISSUE** After the install of SD*5.3*643, the following error may be produced when running ^%INDEX for Routine checks: SDEC * * 275 Lines, 18609 Bytes, Checksum: B119470269 CAP+1 F - Reference to routine '^SDEC58'. That isn't in this UCI. This is due to a change in the load sequence of SD*5.3*643 and SD*5.3*642 where a routine reference to SDEC58 was left in SD*5.3*643. Since the RPC that uses this code is introduced in SD*5.3*642, it will not cause a functional error. After SD*5.3*643 has been installed, please proceed with the install of SD*5.3*642. After SD*5.3*642 has been loaded/installed, this error will no longer show in ^%XINDEX.
SD*5.3*642  SD_5.3_642 VS GUI Release.docx	14 Additional VS GUI functionality	May 5, 2017	**Average Install Time at IOC sites:** There are 5 xrefs added, so install time could be 15-20 minutes.
SD*5.3*645  SD_5.3_645 VS GUI - CID Preferred Date E	Changes Desired Date to CID/PREFERRED DATE in Scheduling	May 5, 2017	**Average Install Time at IOC sites:** Install time should be 5 minutes or less.
GMRC*3.0*86  GMRC_30_86 Patch Description_v5.docx	VS GUI CONSULT Processing Updates for Consults	May 5, 2017	This installation will update routines that support VistA Scheduling GUI API's. **This patch should not be installed with VistA Scheduling GUI users on the system** and it is recommended that it be installed during non-peak hours to minimize potential disruption to other users. **Average Install Time at IOC sites:** The installation time for this patch will vary depending on the size of the REQUEST/CONSULTATION file (#123). Install time should be about the same as GMRC*3.0*83 above.
SD*5.3*651  SD_5.3_651 VS GUI Post Warrenty Suppo	This patch contains 25 sustainment fixes for VS GUI	May 5, 2017	**Average Install Time at IOC sites:** Install time should be 5 minutes or less.
SD*5.3*658	This patch	May 5, 2017	**Average Install Time at IOC sites:** Several comments, as follows:

 sd_5.3_658v11.docx	contains 10 Enhancements and 35 bug fixes		a. There are several new xrefs added, so patch install times can be up to an hour at a large site. b. The Taskman job that's part of the Post Install can take up to 10 hours or more at a large site, based on experience with the Production installs during IOC. A new PARAMETER DEFINITION (XPAR) added in Patch 658 called SDEC DEFAULT FONT SIZE which will hold the default Font. (Recommended default fault = 13) Two new RPCs have been added – - SDECU4 GETFONT allows the VS GUI to get the current default font size. - SDECU4 PUTFONT allows the VS GUI to set a new default font size to the new XPAR.
MBBA*1*4  MBAA_1_4 v1 Patch Description.docx	Enhancement Fixes for VAR Receiver	May 5, 2017	**Average Install Time at IOC sites:** Install time should be 5 minutes or less.

1.5. Software Download

The VS GUI will automatically be installed on the user's PC via a push from the SCCM Administrator team.

SCCM Build Document:

Production Build Document:
http://vaww.eie.va.gov/SysDesign/CS/Shared%20Documents/Build%20Documents/Application%20Field%20Testing/ESE%20VA%20VistA%20Scheduling%20GUI_P%20Build%20Document.pdf

Test Build Document:
http://vaww.eie.va.gov/SysDesign/CS/Shared%20Documents/Build%20Documents/Application%20Field%20Testing/ESE%20VA%20VistA%20Scheduling%20GUI_T%20Build%20Document.pdf

1.6. Security Keys

The VistA Scheduling (VS) Graphical User Interface (GUI) uses security keys to limit the user's ability to change system set-up parameters and patient information.

Note: Not all VS GUI options are available to all users. Contact the site administrator to determine or change security keys.

All VistA users are required to observe the Department of Veterans Affairs (VA) Rules of Behavior regarding patient privacy and the security of both patient information and VA computers and networks.

Perform the following steps in VistA to configure the VS GUI security profile:

1. All Scheduling users must have the SDECZMENU security key.
2. Users who are Scheduling Managers must have the SDECZMGR key assigned. The SDECZMGR key permits access to the **Systems** tab in the VS GUI application. This menu supports the creation of clinic groups and assignment of Privileged Users to Prohibited clinics. See the *VS GUI User Manual* for detailed instructions.
3. Users who perform scheduling tasks and have the responsibility of managing the Veteran Appointment Request (VAR) mobile request will need the SDECZ REQUEST key assigned. The SDECZ REQUEST key permits access to the **Mobile Request** icon on the ribbon bar of the task tab. See the *VS GUI User Manual* for detailed instructions. ***Note: Do not assign the*** SDECZ REQUEST key ***in the VistA TEST environment.***
4. When setting up users in **VistA Menu XUSEREDIT**, users must have a **Default Division** defined, **Multiple Sign-on** must be set to **Allowed**, **Restrict Patient Selection** must be set to **NO**, and **CPRS GUI core** tabs must be defined in the **CPRS Access Tab**.
5. Make the **SDECRPC** menu options available to Scheduling users. These options must be somewhere in the user's path, either as a secondary option or as members of a menu to which the user has access.

2. Logging on to the VS GUI

Use the following steps to log on to the VS GUI, using the **VistA Scheduling** shortcut.

1. On the desktop, double-click the **VistA Scheduling - Shortcut** icon. The VS GUI application opens and the log in screen displays.

Figure 1: VistA Scheduling Log In Screen

2. Enter valid **Access** and **Verify** codes.
3. Click **OK** to complete logging in to the VS GUI.