



PHARMACY BENEFITS MANAGEMENT (PBM) EXTRACT ENHANCEMENTS

INSTALLATION GUIDE

Version 4.0
June 2005

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1. Introduction

1.1 Purpose

To meet the reporting requirements placed on the Pharmacy Benefits Management (PBM) Strategic Healthcare Group (SHG) by external bodies such as the General Accounting Office (GAO), the Institute of Medicine (IOM), as well as congressional oversight bodies, PBMSHG requested enhancements to the Veterans Health Information Systems and Technology Architecture (VistA) PBM V. 4.0 application. PBM V. 4.0 extracts medication dispensing data, procurement data, and clinical data from multiple files in VistA and electronically exports the data via MailMan to the PBM national database.

The data set captured by the PBM V. 4.0 application will be expanded and enhanced to support the Veterans Affairs National Formulary (VANF) disease management issues and patient safety initiatives. The intended audiences for this document are PBM SHG, PBM Extract Enhancement workgroup, Provider Systems Health Systems Design and Development (HSD&D) staff, National VistA support staff, technical writers, and Software Quality Assurance (SQA) staff.

1.2 Scope

PBM V. 4.0 is a new enhanced version of the software and replaces PBM V. 3.0. In a series of three enhancements, new extracts and reports were created, existing extracts were modified, and some options were modified to increase the functionality of this software package. For more detail, refer to the *Pharmacy Benefits Management V. 4.0 Release Notes* document.

1.3 Dependencies and Constraints



Note: PSO*7*165 is a required patch for PSU 4.0, and both have been bundled together in a master build. Implementation of enhancements is dependant on installing the patches listed in the Pre-Installation section.

The recent enhancements allow users to map pharmacy-defined locations from the Automatic Replenishment/Ward Stock (AR/WS) Stats, Controlled Substances (CS), and Drug Accountability applications to a specific Medical Center Division or Outpatient Pharmacy Site.

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2. Pre-Installation

This section lists packages that are required and setup activities that must be performed prior to installing the new PBM software.



PSU 4.0 and PSO*7*165 should not be installed while the monthly *Automatic Pharmacy Statistics* [PSU PBM AUTO] option or a *Manual Pharmacy Statistics* [PSU PBM MANUAL] option is running. Installation may cause the tasked job to error out and not complete.

2.1 Minimum Required Packages

This product shall run on standard hardware platforms used by the Department of Veterans Affairs Healthcare facilities. These systems consist of standard or upgraded Alpha AXP clusters and run VMS DSM, Cache NT, or Cache VMS.

Package	Minimum Version Needed
Adverse Reaction Tracking (ART)	4.0
Auto Replenishment/Ward Stock (AR/WS)	2.3
Controlled Substances	3.0
Drug Accountability	3.0
Inpatient Medications	5.0
Integrated Funds Control, Accounting and Procurement (IFCAP)	5.1
Kernel	8.0
Laboratory	5.2
MailMan	8.0
National Drug File (NDF)	4.0
Outpatient Pharmacy	7.0
Patient Care Encounter (PCE)	1.0
Patient Information Management System (PIMS)	5.3
Pharmacy Data Management (PDM)	1.0
VA FileMan	22.0
Visit Tracking	2.0

The above software is not included in this build and must be installed before this build is completely functional.

2.2 Required Setup

Prior to installing PSU 4.0 and PSO*7*165, sites must perform the activities listed below.

- Install patch DG*5.3*575.
- Confirm that the Automatic Pharmacy Statistics [PSU PBM AUTO] option has run for the previous month and that all the MailMan messages generated have successfully transmitted to the PBM national database at Hines.
- Set up parameters for the new global ^PSUDEM using the steps outlined below. Default values can be used. Only sites running DSM need to set the global protection.

Step	Action
1	Set Journaling: <ul style="list-style-type: none">• Verify that Journaling is enabled, or• Change the setting to “Enabled”.
2	Set Access Privileges: <ul style="list-style-type: none">• Verify that the access privileges are set as listed below, or• Set the following access privileges:<ul style="list-style-type: none">➤ System = RWP➤ World = RW➤ Group = RW➤ UCI = RWP

3. Installation Instructions

This section contains detailed steps to install PSU 4.0 and PSO*7*165.



If PBM V. 4.0 has been previously installed in your test or live account, please proceed to the Appendix in this document (section 5, page 13), and follow the instructions to reinstall PBM V. 4.0.



Note: Only follow these instructions in accounts where PBM V. 4.0 was previously installed. The requirements described in the Appendix must be fulfilled in order to complete the installation of PBM V. 4.0 in those areas.



Note: Installation **MUST** be queued during off hours (for example, at night).

The table below contains the steps necessary to install the software.

Step	Action												
1	<p>Data for this patch is being distributed in a kids host file:</p> <table data-bbox="414 1060 885 1165"> <tr> <td data-bbox="414 1060 560 1102">Filename</td> <td data-bbox="722 1060 885 1102">FTP Protocol</td> </tr> <tr> <td data-bbox="414 1102 560 1123">-----</td> <td data-bbox="722 1102 885 1123">-----</td> </tr> <tr> <td data-bbox="414 1123 560 1165">PSU_4_0.KID</td> <td data-bbox="722 1123 885 1165">ASCII</td> </tr> </table> <p>The preferred method is to FTP this file from download.vista.med.va.gov, which will transmit the file from the first available FTP server.</p> <p>This file may also be downloaded directly from a particular FTP location at the following locations:</p> <table data-bbox="430 1354 933 1459"> <tr> <td data-bbox="430 1354 511 1396">Hines</td> <td data-bbox="625 1354 917 1396">ftp.fo-hines.med.va.gov</td> </tr> <tr> <td data-bbox="430 1396 511 1438">Albany</td> <td data-bbox="625 1396 933 1438">ftp.fo-albany.med.va.gov</td> </tr> <tr> <td data-bbox="430 1438 511 1480">Salt Lake</td> <td data-bbox="625 1438 885 1480">ftp.fo-slc.med.va.gov</td> </tr> </table> <p>The file is available in the ANONYMOUS.SOFTWARE directory.</p>	Filename	FTP Protocol	-----	-----	PSU_4_0.KID	ASCII	Hines	ftp.fo-hines.med.va.gov	Albany	ftp.fo-albany.med.va.gov	Salt Lake	ftp.fo-slc.med.va.gov
Filename	FTP Protocol												
-----	-----												
PSU_4_0.KID	ASCII												
Hines	ftp.fo-hines.med.va.gov												
Albany	ftp.fo-albany.med.va.gov												
Salt Lake	ftp.fo-slc.med.va.gov												
2	Review your mapped set. If the routines are mapped, they should be removed from the mapped set at this time. Currently there are no routines that are recommended by the package to be placed into the mapped set.												
3	From the <i>Kernel Installation & Distribution System</i> menu, select the <i>Installation</i> menu.												
4	From this menu, select the Load a Distribution option and select PSU_4_0.KID.												

5	<p>From this menu, you may select to use the following options (when prompted for INSTALL NAME, enter PSU 4.0):</p> <ol style="list-style-type: none"> <i>Backup a Transport Global</i> - This option will create a backup message of any routines exported with the build. It will not back up any other changes, such as DDs or templates. <i>Compare Transport Global to Current System</i> - This option will allow you to view all changes that will be made when the build is installed. It compares all components of the release (routines, DDs, templates, etc.). <i>Verify Checksums in Transport Global</i> - This option will ensure the integrity of the routines that are in the transport global.
6	Use the <i>Install Package(s)</i> option and select the package PSU 4.0.
7	Install Questions for PSU 4.0:
8	When prompted, "Enter the Coordinator for Mail Group 'PSU PBM':", please respond with the name of your site's PSU PBM Mail Group Coordinator .
9	When prompted "Want KIDS to Rebuild Menu Trees Upon Completion of Install?YES//", respond NO .
10	Install Questions for PSO*7.0*165:
11	When prompted "Want KIDS to INHIBIT LOGONs during the install? YES//", respond NO .
12	When prompted "Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES//", respond NO .
13	If any routines were unmapped as part of step 2, they should be returned to the mapped set once the installation has run to completion.

Example: Screen Display During Installation of PSU 4.0 and PSO*7*165

```
Select Installation Option: LOad a Distribution
Enter a Host File: PSU_4_0.KID

KIDS Distribution saved on Jun 22, 2005@14:17:32
Comment: PSU 4.0 - 06/22/2005

This Distribution contains Transport Globals for the following Package(s):
  PSU 4.0
  PSO*7.0*165
Distribution OK!

Want to Continue with Load? YES// <Enter>
Loading Distribution...

  PSU 4.0
  PSO*7.0*165
Use INSTALL NAME: PSU 4.0 to install this Distribution.

Select Installation Option: INstall Package(s)
Select INSTALL NAME:   PSU 4.0   Loaded from Distribution 6/23/05@07:43:38
=> PSU 4.0 - 06/22/2005 ;Created on Jun 22, 2005@14:17:32

This Distribution was loaded on Jun 23, 2005@07:43:38 with header of
  PSU 4.0 - 06/22/2005 ;Created on Jun 22, 2005@14:17:32
It consisted of the following Install(s):
  PSU 4.0   PSO*7.0*165
Checking Install for Package PSU 4.0

Install Questions for PSU 4.0

Incoming Files:

  59.7      PHARMACY SYSTEM (Partial Definition)
Note: You already have the 'PHARMACY SYSTEM' File.

  59.9      PBM PATIENT DEMOGRAPHICS

Incoming Mail Groups:

Enter the Coordinator for Mail Group 'PSU PBM': <Enter Coordinator here.>

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// NO

Checking Install for Package PSO*7.0*165

Install Questions for PSO*7.0*165

Want KIDS to INHIBIT LOGONs during the install? YES// NO
Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES// NO

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME//   <Enter device here.>
```

----- continued -----

Example: Screen Display During Installation of PSU 4.0 and PSO*7*165 (continued)

```
Install Started for PSU 4.0 :
      Jun 23, 2005@08:28:39

Build Distribution Date: Jun 22, 2005

Installing Routines:
      Jun 23, 2005@08:28:44

Installing Data Dictionaries: .
      Jun 23, 2005@08:28:46

Installing PACKAGE COMPONENTS:

Installing MAIL GROUP

Installing PROTOCOL

Installing OPTION
      Jun 23, 2005@08:28:47

Updating Routine file...

Updating KIDS files...

PSU 4.0 Installed.
      Jun 23, 2005@08:28:50

Install Message sent # 32156897

                                PSO*7.0*165
-----
Install Started for PSO*7.0*165 :
      Jun 23, 2005@08:28:50

Build Distribution Date: Jun 22, 2005

Installing Routines:
      Jun 23, 2005@08:28:50

Updating Routine file...

Updating KIDS files...

PSO*7.0*165 Installed.
      Jun 23, 2005@08:28:50

Install Message sent # 32156898

-----

100% Complete 

|    |    |    |
|----|----|----|
| 25 | 50 | 75 |
|----|----|----|



Install Completed
```

4. Post-Installation

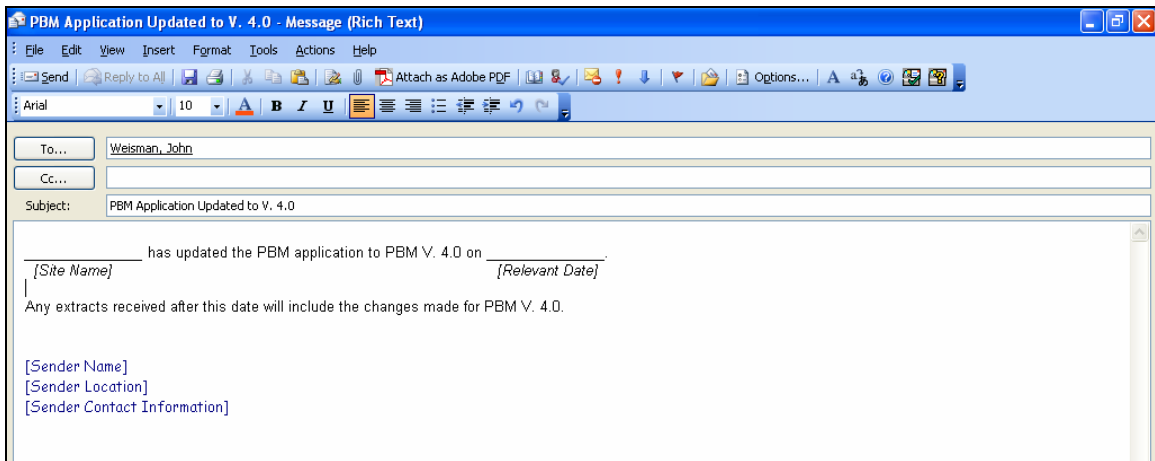
This section describes the tasks that have to be performed after the new PBM software is installed.

4.1 Required Tasks

After installing PSU 4.0 and PSO*7*165, sites must ensure that the following tasks are performed:

- If you did not name a coordinator for the Mail Group 'PSU PBM', use VA FileMan to enter the coordinator's name.
- Pharmacy locations can be mapped using the new *Map Pharmacy Locations* [PSU MAP PHARMACY LOCATIONS] option in order to receive a breakdown of data from those mapped sites for the AR/WS, CS, and Procurement extracts. If the locations are not mapped, the data on those extracts will be included in data from the parent facility.
- Confirm that the *Automatic Pharmacy Statistics* [PSU PBM AUTO] option is scheduled correctly for the next month's transmission.
- Prior to sending the first extract using the new code, notify the Hines PBM group via the following email address that the build has been installed: john.weisman@med.va.gov

Example Email Message to Hines PBM Group



4.2 After Checksums

This section lists the routines and related checksums for PSO*7*165 and PSU 4.0 after the installation process.

4.2.1 PSO*7*165 Routines

PSOORDER value = 38147160

4.2.2 PSU 4.0 Routines

PSUAA1 value = 5004740
PSUAA2 value = 2048002
PSUALERT value = 2451350
PSUAMC value = 1435929
PSUAR0 value = 2539270
PSUAR1 value = 6597726
PSUAR2 value = 4029683
PSUAR3 value = 3301995
PSUAR4 value = 4559435
PSUAR5 value = 2705021
PSUAR6 value = 15918574
PSUAR7 value = 10780321
PSUCP value = 19771114
PSUCP1 value = 17802546
PSUCP2 value = 6628603
PSUCP3 value = 266373
PSUCS0 value = 1105018
PSUCS1 value = 2690675
PSUCS17 value = 1182805
PSUCS2 value = 1760097
PSUCS3 value = 1807764
PSUCS4 value = 2023448
PSUCS5 value = 1715619
PSUCSR0 value = 4822512
PSUCSR1 value = 6560340
PSUCSR2 value = 5639812
PSUDBQUE value = 11635692
PSUDEM0 value = 6311295
PSUDEM1 value = 7925968
PSUDEM2 value = 6722886
PSUDEM3 value = 2240229
PSUDEM4 value = 10782922
PSUDEM5 value = 8224573
PSUDEM6 value = 1246268
PSUDEM7 value = 4510645

continued . . .

PSUDEM8	value = 6660546
PSUDEM9	value = 2831680
PSUENV	value = 2337736
PSUHL	value = 3698103
PSULR0	value = 3357916
PSULR1	value = 2109050
PSULR2	value = 2242423
PSULR3	value = 2259242
PSULR4	value = 3433569
PSULR5	value = 6545368
PSULR6	value = 1738680
PSUMAP0	value = 10846239
PSUMAPR	value = 8795474
PSUOP0	value = 2639829
PSUOP1	value = 4220637
PSUOP2	value = 8813762
PSUOP3	value = 13796489
PSUOP4	value = 6248132
PSUOP5	value = 9056798
PSUOP6	value = 5380760
PSUOP7	value = 5382491
PSUOP8	value = 14667137
PSUOPAM	value = 3339220
PSUOPMD	value = 8613833
PSUPR0	value = 4023661
PSUPR1	value = 4340187
PSUPR2	value = 9531754
PSUPR3	value = 3440365
PSUPR4	value = 3448048
PSUPR5	value = 8260662
PSUPR6	value = 1813032
PSURT1	value = 8587609
PSURT2	value = 2926788
PSURTQ	value = 241328
PSUSUM1	value = 5954587
PSUSUM2	value = 11457848
PSUSUM3	value = 12119964
PSUSUM4	value = 13648090
PSUSUM5	value = 9189658
PSUSUM6	value = 12857626
PSUSUM7	value = 14299810
PSUTL	value = 4583242
PSUTL1	value = 1238679
PSUUD0	value = 1564960

continued . . .

PSUUD1	value = 5681173
PSUUD2	value = 7162225
PSUUD3	value = 5907013
PSUUD4	value = 2603802
PSUUD5	value = 4159672
PSUUD6	value = 7640357
PSUUD7	value = 5347664
PSUV0	value = 1980215
PSUV1	value = 13627369
PSUV10	value = 7002558
PSUV11	value = 1038711
PSUV12	value = 12399968
PSUV2	value = 13953791
PSUV3	value = 3638955
PSUV4	value = 6627596
PSUV5	value = 3907420
PSUV6	value = 6845919
PSUV7	value = 6773340
PSUV8	value = 6994421
PSUV9	value = 7069860
PSUVIT	value = 1714
PSUVIT0	value = 2469
PSUVIT1	value = 10457162
PSUVIT2	value = 2058126

5. Appendix: Reinstallation Requirements

Sites that have previously installed PSU 4.0 software and are reinstalling it must fulfill the three requirements described below.

5.1 Add Child Protocols to Parent Protocols

The first requirement is to add the child protocols listed below to the appropriate parent protocol. This requirement may be met either before or after the PSU 4.0 reinstall as long as it is completed before going into Production.



Note: If PSU PATIENT DEMOGRAPHIC CHANGE is already attached to the DG FIELD MONITOR protocol, leave it attached.

Parent Protocol	Associated Child Protocols
LR70 ALL EVSEND RESULTS	1) LA7 LAB RESULTS ACTION 2) ROR EVENT LAB 3) RG LAB EVENT 4) RG MICRO EVENT
DG FIELD MONITOR	1) PSU PATIENT DEMOGRAPHIC CHANGE 2) SCMC PCMM INACTIVATE ON DATE OF DEATH 3) ROR EVENT LAB 4) RG LAB EVENT 5) RG MICRO EVENT

If your site does not have a child protocol listed above, it simply means that your site does not use that protocol.

Example: Adding child protocols or items to a parent protocol using VA FileMan.

```
Select OPTION:      ENTER OR EDIT FILE ENTRIES

INPUT TO WHAT FILE: INSTALL// PROTOCOL      (4900 entries)
EDIT WHICH FIELD: ALL// NAME
THEN EDIT FIELD: ITEM
    1  ITEM      (multiple)
    2  ITEM TEXT
CHOOSE 1-2: 1  ITEM (multiple)
    EDIT WHICH ITEM SUB-FIELD: ALL// .01  ITEM
    THEN EDIT ITEM SUB-FIELD: <Enter>
THEN EDIT FIELD: <Enter>
```

Adding child protocols to the parent protocol LR70 ALL EVSEND RESULTS:

```
Select PROTOCOL NAME: LR70 ALL EVSEND RESULTS      LAB RESULTS => EXTERNAL PACKAGE
NAME: LR70 ALL EVSEND RESULTS Replace
Select ITEM: ROR EVENT LAB      LAB RESULTS => ROR PENDING PATIENT // <Enter>
    ITEM: ROR EVENT LAB      LAB RESULTS => ROR PENDING PATIENT// <Enter>
Select ITEM: LA7 LAB RESULTS ACTION      LAB RESULTS => EXTERNAL PACKAGE
Select ITEM: RG LAB EVENT      Lab --> CIRN
Select ITEM: RG MICRO EVENT      Micro --> CIRN
Select ITEM:<Enter>
>
```

Adding child protocols to the parent protocol DG FIELD MONITOR:

```
Select PROTOCOL NAME: DG FIELD MONITOR      DG Field Monitor
Select ITEM: PSU PATIENT DEMOGRAPHIC CHANGE// <Enter>
    ITEM: PSU PATIENT DEMOGRAPHIC CHANGE // <Enter>
Select ITEM: SCMC PCMM INACTIVATE ON DATE OF DEATH
Select ITEM: SPN REG STATUS UPDATE
Select ITEM: SPN REG STATUS DELETE
Select ITEM: FB PATIENT DATA CHANGE
Select ITEM: VAFC MPIP FIELD TRIGGER
Select ITEM: <Enter>
>
```

5.2 Delete ^PSULRHL1 and ^PSULRHLI

Please delete ^PSULRHL1 and ^PSULRHLI from your test and/or production area(s).

5.3 Install PSU 4.0 Software

Once your protocols are restored and the ^PSULRHL1 and ^PSULRHLI routines are deleted, please return to section 3 of these Installation Instructions and complete the reinstallation of the PSU 4.0 software.