VistA

Update _2_0_27

Clinical Reminders

VA-CHOICE DIALOGS

Install Guide

June 2017

Product Development
Office of Information Technology
Department of Veterans Affairs

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Introduction

This update contains two clinical reminder dialogs VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386 and VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A. These reminder dialogs are a *replacement for current TXML templates* that are in use now.

UPDATE_2_0_27 contains 1 Reminder Exchange entry:
> **UPDATE_2_0_27 VA-VHA CHOICE APPROVAL FOR MEDICAL CARE**

The exchange file contains the following components:

TIU TEMPLATE FIELD
> VA-10-0386A EDIT 30-40 REQ
> VA-10-0386 EDIT 30-40
> VA-10-0386 WP 2 LINE
> VA-10-0386 ALT POC TXT
> VA-10-0386A EDIT 30-40
> VA-10-0386 EDIT 30-40 REQ
> VA-10-0386 CALENDAR
> VA-10-0386 PLEASE NOTE TXT
> VA-10-0386 WP 2 LINE REQ
> VA-10-0386 NUMBER OF VISITS TXT
> VA-10-0386 SERVICE/PROCEDURE TXT
> VA-10-0386 SPECIALIST TXT
> VA-10-0386 CAT OF CARE TXT
> VA-10-0386 CALENDAR REQ
> VA-10-0386 CID TXT
> VA-10-0386A WP 2 LINE
> VA-10-0386A ELIGIBILITY TYPE TXT
> VA-10-0386A APPOINTMENT COMMENT TXT
> VA-10-0386A CALENDAR
> VA-10-0386A PLEASE NOTE TXT
> VA-10-0386A WP 2 LINE REQ
> VA-10-0386A NUMBER OF VISITS TXT
> VA-10-0386A SERVICE/PROCEDURE TXT
> VA-10-0386A SPECIALIST TXT
> VA-10-0386A SPECIALTY TXT
> VA-10-0386A USE OF PROVIDER AGRMNT LIST

HEALTH FACTORS
> VA-REMINDER UPDATES
> VA-UPDATE_2_0_27

REMINDER TERM
        VA-REMINDER UPDATE_2_0_27
REMINDER DIALOG
        VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
        VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A

Install Details

This update is being distributed as a web host file. The address for the host file is:
http://vista.med.va.gov/reminders/UPDATE_2_0_27.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 20 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:
http://vista.med.va.gov/reminders/UPDATE_2_0_27.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_27 VA-CHOICE DIALOGS in reminder exchange.

```
+Item   Entry                          Source                    Date Packed
    66  UPDATE_2_0_27 VA-CHOICE        GRIFFITH@SALT LAKE CI     06/14/2017@11:33
        DIALOGS
    67  UPDATE_2_0_28                  GRIFFITH@SALT LAKE CI     06/07/2017@09:53
        VA-MENINGOCOCCAL IMMUNIZATIONS
    68  UPDATE_2_0_29 VA-HOMELESSNESS  GRIFFITH@SALT LAKE CI     06/14/2017@08:43
        FOOD INSECURITY
    69  UPDATE_2_0_30 VA-IRAQ &        GRIFFITH@SALT LAKE CI     05/11/2017@05:37
        AFGHAN POST-DEPLOY
    70  UPDATE_2_0_30 VA-IRAQ &        GRIFFITH@SALT LAKE CI     05/18/2017@13:25
        AFGHAN POST-DEPLOY
+            + 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
Select Action: Next Screen// IFE    Install Exchange File Entry
Enter a list or range of numbers (1-206): 66  <---
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry titled UPDATE_2_0_27 VA-CHOICE
DIALOGS *(in this example it is entry 66, it will vary by site)*

```
        Component                                     Category      Exists
Source:      GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 06/14/2017@11:33:45
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
  VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A

REMINDER TERM
  VA-REMINDER UPDATE_2_0_27

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.
You will then see multiple prompts for installation.: *Note that you will enter a response of
Install for all new components.

You will then be prompted to install the first reminder dialog component:

```
Packed reminder dialog: VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386

 Item  Seq. Dialog Findings                                   Type      Exists
    1     VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM      dialog
          10-0386

    2   5 VA-GP VHA FORM 10-0386 FORM TITLE                    group
            Finding: *NONE*
    3   5.1 VA-VHA FORM 10-0386 BLANK LINE                     element
            Finding: *NONE*
    4   5.2 VA-VHA FORM 10-0386 NON-DISCLOSURE STATEMENT       element
            Finding: *NONE*
    5   5.5 VA-VHA FORM 10-0386 BLANK LINE                     element
            Finding: *NONE*
    6   5.10 VA-GP VHA FORM 10-0386 SELECT REFERRAL URGENCY    group
            Finding: *NONE*
    7   5.10.5 VA-VHA FORM 10-0386 ROUTINE                     element
            Finding: *NONE*
+         + 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-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386**

Select Action: Next Screen// IA   Install All

All dialog components for VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386 are new.

Install reminder dialog and all components with no further changes: Y// ES

```
Dialog Components             May 18, 2017@16:44:57          Page:   1 of   37
Packed reminder dialog: VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386 (reminder dialog) instal
 Item  Seq. Dialog Findings                                   Type      Exists
    1     VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM      dialog      X
          10-0386

    2   5 VA-GP VHA FORM 10-0386 FORM TITLE                    group       X
            Finding: *NONE*
    3   5.1 VA-VHA FORM 10-0386 BLANK LINE                     element     X
            Finding: *NONE*
    4   5.2 VA-VHA FORM 10-0386 NON-DISCLOSURE STATEMENT       element     X
            Finding: *NONE*
    5   5.5 VA-VHA FORM 10-0386 BLANK LINE                     element     X
            Finding: *NONE*
    6   5.10 VA-GP VHA FORM 10-0386 SELECT REFERRAL URGENCY    group       X
            Finding: *NONE*
    7   5.10.5 VA-VHA FORM 10-0386 ROUTINE                     element     X
            Finding: *NONE*
+         + 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
```

When the dialog has completed installation, you will then be returned to this screen. At the **Select Action** prompt, type **Q.**

You will then be prompded to install the second reminder dialog component:

```
Packed reminder dialog: VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A [NATIONA

 Item  Seq. Dialog Findings                                    Type      Exists
   1       VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A      dialog

   2     5 VA-GP VCP FORM 10-0386A FORM TITLE                   group
           Finding: *NONE*
   3     5.1 VA-VCP FORM 10-0386A BLANK LINE                    element
           Finding: *NONE*
   4     5.2 VA-VCP FORM 10-0386A NON-DISCLOSURE STATEMENT      element
           Finding: *NONE*
   5     5.4 VA-VCP FORM 10-0386A BLANK LINE                    element
           Finding: *NONE*
   6     5.5 VA-GP VCP FORM 10-0386A REASON FOR USE OF          group
         PROVIDER AGRMNT
           Finding: *NONE*
   7     5.10 VA-VCP FORM 10-0386A BLANK LINE                   element
           Finding: *NONE*
+         + 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 – **Q**

Select Action: Next Screen// IA   Install All

Install reminder dialog and all components with no further changes: Y// ES

```
Packed reminder dialog: VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A [NATIONA
VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A (reminder dialog) installed from
 Item  Seq. Dialog Findings                                    Type      Exists
   1       VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A      dialog      X

   2     5 VA-GP VCP FORM 10-0386A FORM TITLE                   group       X
           Finding: *NONE*
   3     5.2 VA-VCP FORM 10-0386A NON-DISCLOSURE STATEMENT      element     X
           Finding: *NONE*
   4     5.5 VA-GP VCP FORM 10-0386A REASON FOR USE OF          group       X
         PROVIDER AGRMNT
           Finding: *NONE*
   5     5.15 VA-VCP FORM 10-0386A COMMUNITY PROVIDER NAME      element     X
           Finding: *NONE*
   6     5.25 VA-VCP FORM 10-0386A AUTHORIZATION NUMBER         element     X
           Finding: *NONE*
   7     5.35 VA-VCP FORM 10-0386A VA ORDERING PROVIDER         element     X
           Finding: *NONE*
+         + 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
```

When the dialog has completed installation, you will then be returned to this screen. At the
Select Action prompt, type **Q.**

```
        Component                                          Category    Exists
Source:      GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 06/14/2017@11:33:45
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
  VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A

REMINDER TERM
  VA-REMINDER UPDATE_2_0_27

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 **<u>Select Action</u>** prompt, type **Q.**

Install Completed Post Installation

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

> **From the Reminders Manager Menu:**
> Select Reminder Managers Menu 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
>> DL Default Outside Location
>> PT Position Reminder Text at Cursor
>
> Select CPRS Reminder Configuration 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 [choose from INSTITUTION]
>> 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:
Select Display Sequence: **?**
       148 VA-VETERANS CHOICE NOTE
       149 VA-TBI SCREENING
       151 VACO TRANSPLANT REFERRAL (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, looking above I see the numbers 152 and 153 are not present, so I will use 152 and 153.*
Select Display Sequence: **152**
Are you adding 152 as a new Display Sequence? Yes// **Y YES**
Display Sequence: 152// **<Enter>**
Clinical Reminder Dialog**:** **VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386 <Enter>**
OK? Yes// **<Enter> (Yes)**

Select Display Sequence: **153**
Are you adding 153 as a new Display Sequence? Yes// **Y YES**
Display Sequence: 153// **<Enter>**
Clinical Reminder Dialog**:** **VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A <Enter>**
OK? Yes// **<Enter> (Yes)**

2. Setup of Note titles

These note titles should already exist on your system. If you do not have these note titles on your system create them by following the instructions below.

Create the **VCP-CHOICE PROV AGRMT VAF 10-0386A** note title in the same **Document Class that currently contains other local Veterans Choice Program/Non-VA care progress note titles**. Map the note title to the VHA Enterprise Standard Title: NONVA NOTE.

Create the **VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386** note title in the same **Document Class that currently contains other local Veterans Choice Program/Non-VA care progress note titles**. Map the note title to the VHA Enterprise Standard Title: NONVA NOTE.

Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the TIU/ASU Implementation Guide
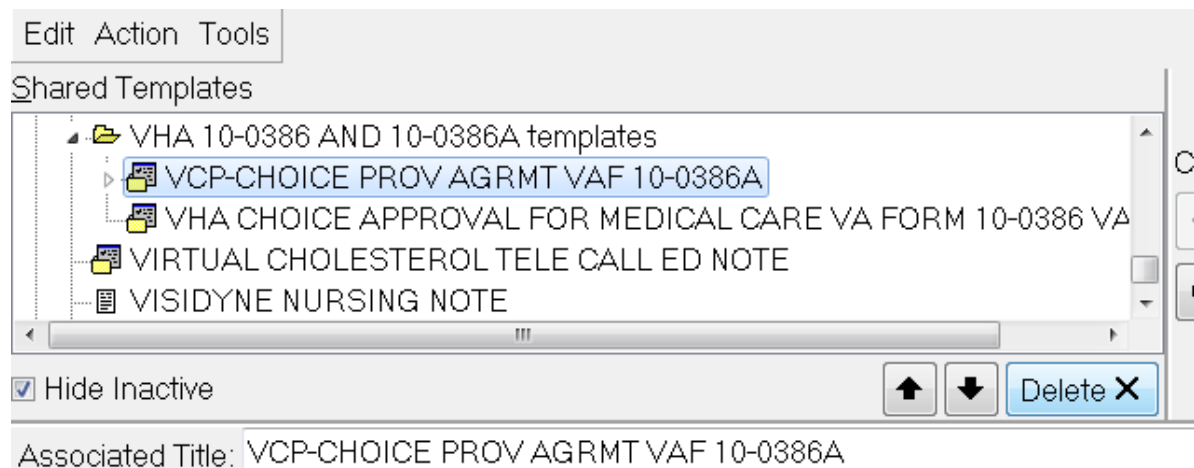
3. **Associate the reminder dialog with the note title in CPRS.**

==The VCP-CHOICE PROV AGRMT VAF 10-0386A and the VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386 note titles may have TIU templates associated with them.==
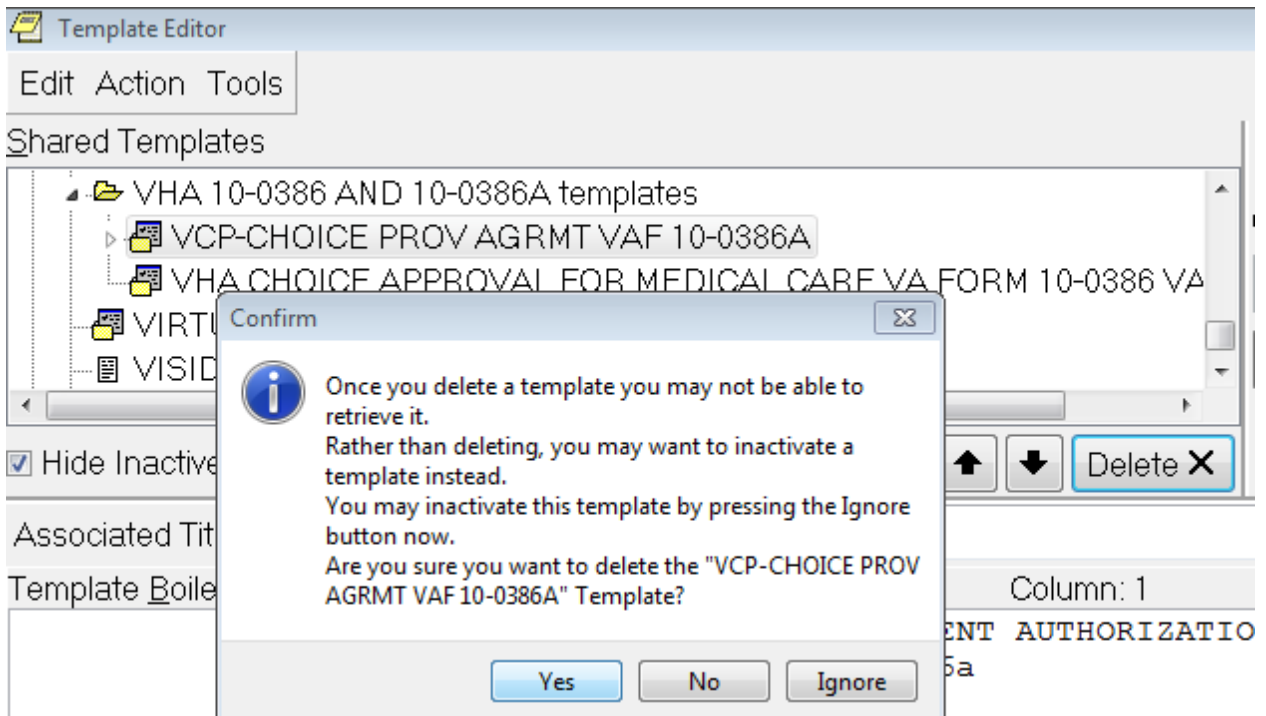
a) In the DOCUMENTS TITLES FOLDER, find the previous version of the templates which should have associated note titles.
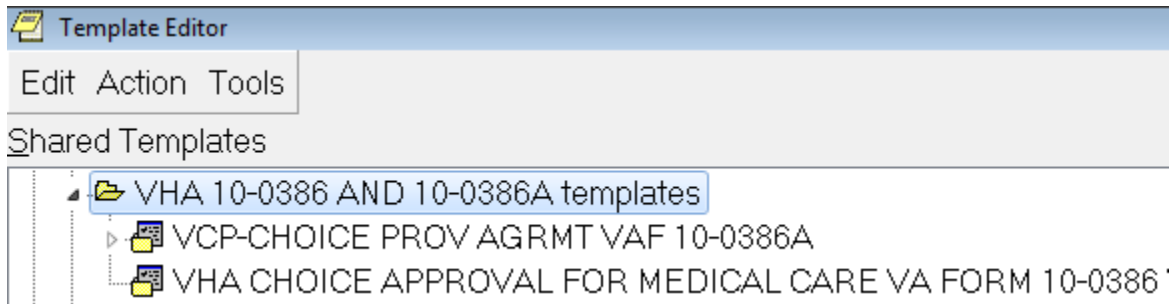
b) Click on one of the previous version templates and click DELETE.

c) **A confirmation message will appear; click YES to delete the previous version of the template.**

d) **Click APPLY to save the changes.**

e) **Repeat steps 3a-3d for the second template.**

4. **To associate the two new reminder dialog templates to the note titles, go to Template Editor and then click on the Document Titles Folder.**

5. **Choose New Template (top right-hand corner).**

---
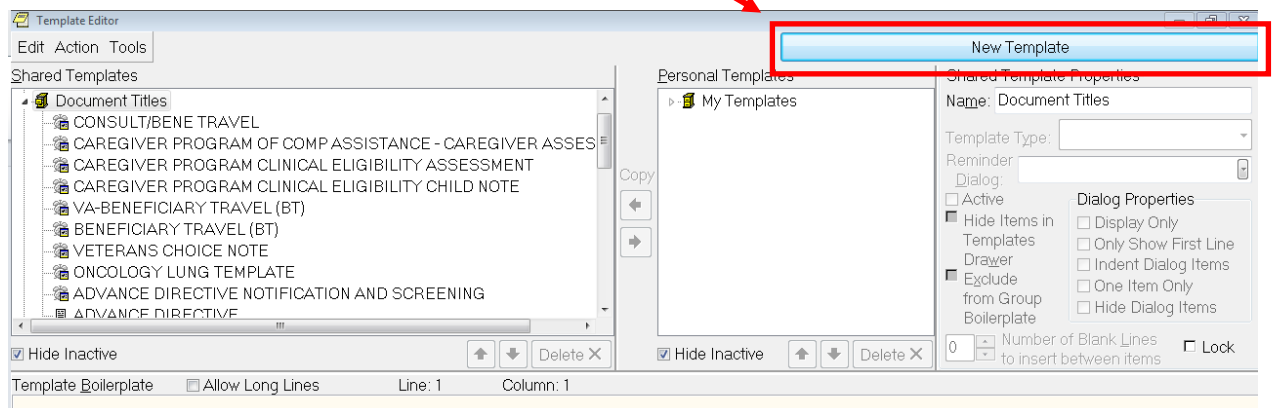
6. Type in the following information:
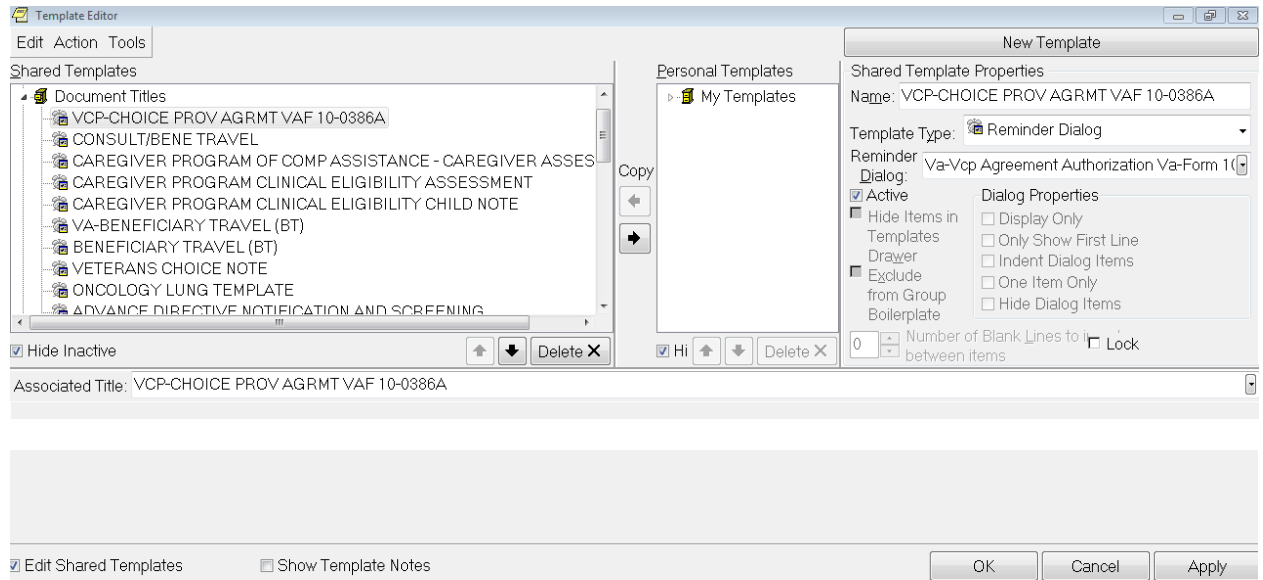
Name: VCP-CHOICE PROV AGRMT VAF 10-0386A
Template Type: Reminder Dialog
Reminder Dialog: VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A
Associated Title: VCP-CHOICE PROV AGRMT VAF 10-0386A
Click Apply
Click OK

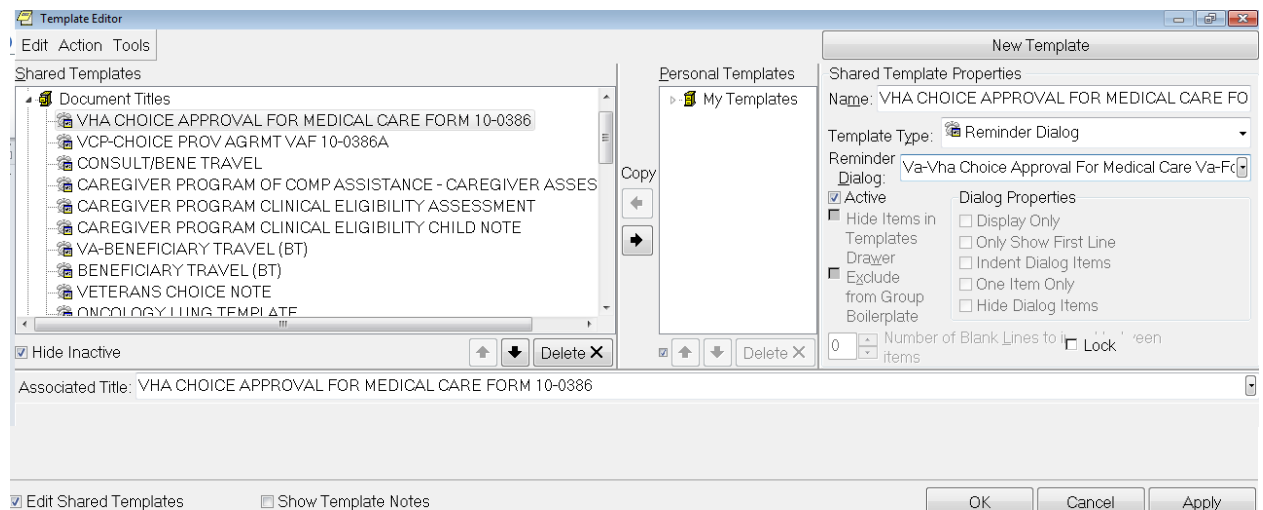**Name:** VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
Template Type: Reminder Dialog
Reminder Dialog: VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
Associated Title: VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386
Click Apply
Click OK

7. **Update of Elements to enter the Veteran's demographic information and the facility's information.**

You will need to insert data objects representing the Veteran's demographic information if available and insert your facility's information into the dialog element(s) below.

For the <mark>VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A</mark> reminder dialog template, the elements are:

VAL-VCP FORM 10-0386A VETERANS NAME
VAL-VCP FORM 10-0386A VETERANS DATE OF BIRTH
VAL-VCP FORM 10-0386A VETERANS SOCIAL SECURITY NUMBER
VAL-VCP FORM 10-0386A VETERANS ADDRESS
VAL-VCP FORM 10-0386A VETERANS PHONE NUMBER
VAL-VCP FORM 10-0386A VETERANS ALTERNATE PHONE NUMBER
VAL-VCP FORM 10-0386A VETERANS ALTERNATE ADDRESS
VAL-VCP FORM 10-0386A ALTERNATE POC NAME
VAL-VCP FORM 10-0386A ALTERNATE POC ADDRESS
VAL-VCP FORM 10-0386A ALTERNATE POC PHONE NUMBER
VAL-VCP FORM 10-0386A LOCAL VHA OCC MANAGER NAME
VAL-VCP FORM 10-0386A LOCAL VHA OCC MANAGER TITLE
VAL-VCP FORM 10-0386A LOCAL VHA OCC CONTACT NUMBER
VAL-VCP FORM 10-0386A AFTER HOURS POINT OF CONTACT NUMBER
VAL-VCP FORM 10-0386A FACILITY NUMBER
VAL-VCP FORM 10-0386A FACILITY NAME
VAL-VCP FORM 10-0386A FACILITY STREET ADDRESS
VAL-VCP FORM 10-0386A FACILITY CITY
VAL-VCP FORM 10-0386A FACILITY STATE
VAL-VCP FORM 10-0386A FACILITY ZIP CODE
VAL-VCP FORM 10-0386A FACILITY FAX NUMBER

For the <mark>VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386</mark> reminder dialog template, the elements are:

VAL-VHA FORM 10-0386 LOCAL VHA OCC MANAGER NAME
VAL-VHA FORM 10-0386 LOCAL VHA OCC MANAGER TITLE
VAL-VHA FORM 10-0386 LOCAL VHA OCC CONTACT NUMBER
VAL-VHA FORM 10-0386 AOD/EMERGENCY CONTACT NUMBER
VAL-VHA FORM 10-0386 FACILITY NUMBER
VAL-VHA FORM 10-0386 FACILITY NAME
VAL-VHA FORM 10-0386 FACILITY STREET ADDRESS
VAL-VHA FORM 10-0386 FACILITY CITY
VAL-VHA FORM 10-0386 FACILITY STATE
VAL-VHA FORM 10-0386 FACILITY ZIP CODE
VAL-VHA FORM 10-0386 FACILITY FAX NUMBER
VAL-VHA FORM 10-0386 VETERANS NAME
VAL-VHA FORM 10-0386 VETERANS DATE OF BIRTH
VAL-VHA FORM 10-0386 VETERANS SOCIAL SECURITY NUMBER

VAL-VHA FORM 10-0386 VETERANS ADDRESS
VAL-VHA FORM 10-0386 VETERANS PHONE NUMBER
VAL-VHA FORM 10-0386 VETERANS ALTERNATE PHONE NUMBER
VAL-VHA FORM 10-0386 VETERANS ALTERNATE ADDRESS
VAL-VHA FORM 10-0386 ALTERNATE POC NAME
VAL-VHA FORM 10-0386 ALTERNATE POC ADDRESS
VAL-VHA FORM 10-0386 ALTERNATE POC PHONE NUMBER

Navigate to Reminder Dialogs and change your view to **ELEMENTS.**

Search for **VAL-VCP FORM** to find the Elements for the ==VA-VCP AGREEMENT AUTHORIZATION VA-FORM 10-0386A== reminder dialog template

Even though this element begins with "VAL-", it is LOCAL, so you will be able to edit the DIALOG/PROGRESS NOTE TEXT field.

1) Replace the text in the Veteran's information with patient data objects.
   You will replace the existing template field with a data object.
2) Replace the text in the facility's information with your site's information, if you are an integrated site, you may want to leave these as text fields.

Search again for **VAL-VHA FORM** to find the Elements for the ==VA-VHA CHOICE APPROVAL FOR MEDICAL CARE VA-FORM 10-0386== reminder dialog template.

Even though this element begins with "VAL-", it is LOCAL, so you will be able to edit the DIALOG/PROGRESS NOTE TEXT field.

1) Replace the text in the Veteran's information with patient data objects.
   You will replace the existing template field with a data object.
3) Replace the text in the facility's information with your site's information, if you are an integrated site, you may want to leave these as text fields.

NOTE: *If you require further technical assistance, please notify your local IT support to log a national CA Service Desk Manager (SDM) ticket (previously a Remedy™ ticket) or contact the VA Service Desk at 1-888-596-4357 and have them submit a national CA ticket to the Incident Area: NTL.APP.VISTA.CLINICAL REMINDERS 2_0 and we will contact you*