Update _2_0_41

Clinical Reminders

VA-FUNCTIONAL REVIEW

Install Guide

October 2018

Product Development
Office of Information Technology
Department of Veterans Affairs

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Introduction

Description:

There is a robust base of evidence for identifying factors predictive of future dependence and decline in health status in older adults. A comprehensive functional assessment is needed in the EHR for the assessment of individual Veteran function in order to provide patient-centered care, support clinical decision-making, facilitate communication among health care providers and programs, and to provide an infrastructure of comparable information about the VHA patient population. This template has been designed by a multidisciplinary taskforce of subject matter experts including but not limited to representation from, primary care, nursing, social work, the office of business intelligence and analytics, and geriatrics. The intent is to capture essential information in a manner to reduce burden to care providers. It's use will not be mandated but will be encouraged especially within Geriatric Primary Aligned Care Team (GeriPACT) clinics. The template does not need to be completed entirely in one session but rather as provider time permits. Sections do not need to be completed in order. The template information can be used to populate a progress note. Sites will be able to customize the referral sections. The health factors will support performance metrics and trend analysis.

One reminder dialogs is being distributed with this update:
        VA-FUNCTIONAL AND PSYCHOSOCIAL

Two reminder terms are being distributed with this update:
        VA-UPDATE_2_0_41
        VA-HEALTH AND WELL BEING

The term VA-HEALTH AND WELL BEING contains 21 new Health Factors. These are not part of this project but are being installed *using* this project.

UPDATE_2_0_41 contains 1 Reminder Exchange entry:
        UPDATE_2_0_41 FUNCTIONAL AND PSYCHOSOCIAL TEMPLATE

The exchange file contains the following components:

REMINDER DIALOG
VA-FUNCTIONAL AND PSYCHOSOCIAL

TIU TEMPLATE FIELD
TEXT 30
WP FREE TEXT (74X4)
WORD PROCESSING

HEALTH FACTORS
VA-REMINDER UPDATES
VA-UPDATE_2_0_41
VA-HEALTH AND WELL BEING [C]

```
VA-WHS - INTRODUCTION TO WHOLE HEALTH
VA-WHS - CHANGING THE CONVERSATION
VA-WHS - PERSONAL HEALTH INVENTORY
VA-WHS - PERSONAL HEALTH PLANNING
VA-WHS - AROMATHERAPY
VA-WHS - WHOLE HEALTH EDUCATION
VA-WHS - YOGA
VA-WHS - WHOLE HEALTH COACHING
VA-WHS - THERAPEUTIC OR HEALING TOUCH
VA-WHS - TAI CHI
VA-WHS - RELAXATION TECHNIQUES
VA-WHS - REIKI
VA-WHS - MINDFULNESS OTHER THAN MBSR
VA-WHS - MEDITATION
VA-WHS - MINDFULNESS BASED STRESS REDUCE
VA-WHS - INTEGRATIVE HEALTH
VA-WHS - BFA
VA-WHS - TAKING CHARGE LIFE AND HEALTH
VA-WHS - GUIDED IMAGERY
VA-WHS - QI GONG
VA-WHS - EXPRESSIVE ARTS
DEMENTIA WARNING SIGNS
DWS - NO DEMENTIA WARNING SIGNS REPORTED
DWS OTHER
DWS DEFERS CONVERSATION TO FAMILY/OTHER
DWS UNABLE TO ADAPT TO STRESS
DWS UNEXPL WT LOSS/FAILURE TO THRIVE
DWS FAILS TO FOLLOW INSTRUCTIONS
DWS POOR HISTORIAN
DWS - APPEARS UNKEMPT
DWS FREQ NO SHOWS
DWS-NOT TAKING CARE OF SELF
DWS-CONFUSION: TIME, PEOPLE AND PLACES
DWS-UNABLE TO FOLLOW DIRECTIONS
DWS - BECOMING LOST IN FAMILIAR PLACES
DWS - ASKING SAME QUESTIONS REPEATEDLY
DWS REPORTED BY
DWS REPORTED BY - CARE TEAM MEMBER
DWS REPORTED BY - FAMILY/CAREGIVER
DWS REPORTED BY - PATIENT
DWS - MEMORY LOSS DISRUPTING DAILY LIFE
DWS - DIFFICULTY W/PX SOLVING/PLANNING
DWS - PXS COMPLETING FAMILIAR TASKS
DWS - CONFUSION WITH TIME OR PLACE
DWS - TROUBLE PROCESSING VISUAL IMAGES
DWS - PXS W/SPACIAL RELATIONSHIPS
DWS - NEW PXS W/WRITING/SPEECH
DWS - LOSING ITEMS/CAN'T RETRACE STEPS
DWS - DECREASED/POOR JUDGEMENT
DWS - WITHDRAWAL FROM WORK/SOCIAL
DWS - CHANGES IN MOOD/PERSONALITY
DWS - CHALLENGES IN PLANNING/SOLVING PXS
DWS EATING POORLY
FALL
```

```
FALL DID NOT CAUSE INJURY
FALL INJURY DID NOT CHANGE FUNCTIONALITY
FALL INJURY CHANGED FUNCTIONALITY
FALL CAUSED AN INJURY
FALL-MORE THAN 1 IN PAST 12 MONTHS
FALL-NONE IN PAST 12 MONTHS
FALL-ONE IN LAST 12 MONTHS
FALL IN LAST YEAR
PAIN
PAIN DOESNT INTERFERE WITH LIFE QUALITY
PAIN INTERFERES WITH QUALITY OF LIFE
LIVING SITUATION
NO CONCERNS ABOUT LIVING SITUATION
CONCERNS ABOUT LIVING SITUATION
CONTACTS OTHER FOR HELP
CONTACTS NO ONE FOR HELP
CONTACTS NEIGHBOR FOR HELP
CONTACTS RELATIVE FOR HELP
CONTACTS FRIEND FOR HELP
CONTACTS CHILD FOR HELP
LIVES ALONE
LIVES WITH OTHER
LIVES WITH FRIEND
LIVES WITH CHILD
LIVES WITH SPOUSE/SIGNIFICANT OTHER
CONTACTS HOUSEHOLD MEMBER FOR HELP
LIFE SPACE
NOT BEEN OUTSIDE OF BEDROOM
DID NOT NEED ASSISTANCE
NEEDED EQUIPMENT
NEEDED PERSONAL ASSISTANCE
DAILY
FOUR TO SIX TIMES A WEEK
ONE TO THREE TIMES A WEEK
LESS THAN ONE TIME A WEEK
BEEN TO ROOMS IN HOUSE OUTSIDE BEDROOM
BEEN TO PLACES OUTSIDE OF THEIR HOME
BEEN OUTSIDE OF NEIGHBORHOOD
BEEN OUTSIDE OF TOWN
BEEN TO PLACES IN NEIGHBORHOOD
VA-GEC PHYSICAL AGGRESSION
VA-GEC PHYSICAL AGGRESSION DISPRUPTION 3
VA-GEC PHYSICAL AGGRESSION DISPRUPTION 2
VA-GEC PHYSICAL AGGRESSION DISPRUPTION 1
VA-GEC PHYSICAL AGGRESSION DISPRUPTION 0
VA-GEC VERBAL DISPRUPTION
VA-GEC BEHAVIOR VERBAL DISPRUPTION 3
VA-GEC BEHAVIOR VERBAL DISPRUPTION 2
VA-GEC BEHAVIOR VERBAL DISPRUPTION 1
VA-GEC BEHAVIOR VERBAL DISPRUPTION 0
VA-GEC DISRUPTIVE BEHAVIOR
VA-GEC DISRUPTIVE BEHAVIOR DISPRUPTION 3
VA-GEC DISRUPTIVE BEHAVIOR DISPRUPTION 2
VA-GEC DISRUPTIVE BEHAVIOR DISPRUPTION 1
```

VA-GEC DISRUPTIVE BEHAVIOR DISPRUPTION 0
VA-GEC BEHAVIOR HALLUCINATIONS
VA-GEC BEHAVIOR HALLUCINATIONS YES
VA-GEC BEHAVIOR HALLUCINATIONS NO
LEARNING CHARACTERISTICS
PRIMARY LANGUAGE IS NOT ENGLISH
NEED FOR INTERPRETER
PRIMARY LANGUAGE ENGLISH
LEVEL OF EDUCATION
EDUCATION >12TH GRADE
EDUCATION 9-12 GRADE
EDUCATION <9TH GRADE

REMINDER SPONSOR
Office of Geriatric Extended Care
Mental Health Services

REMINDER TERM
VA-UPDATE_2_0_41
VA-HEALTH AND WELL BEING
VA-GEC ORDER SUPPRESSION
VA-BL ADL
VA-BL IADL
VA-BL DWS
VA-BL FALLS
VA-BL PAIN
VA-BL LIVING SITUATION
VA-BL LIFE SPACE
VA-BL BEHAVIOR
VA-BL PRIMARY LANGUAGE
VA-BL LEVEL OF EDUCATION

HEALTH SUMMARY COMPONENT
MHA Score
PCE HEALTH FACTORS SELECTED

HEALTH SUMMARY TYPE
KATZ ADL
IADL
VA-DWS
VA-FALLS
VA-PAIN
VA-LIVING SITUATION
VA-LIFE SPACE
VA-GEC BEHAVIOR
VA-PRIMARY LANGUAGE
VA-LEVEL OF EDUCATION

HEALTH SUMMARY OBJECTS
VA-KATZ ADL (TIU)
IADL (TIU)
VA-DWS (TIU)

```
VA-FALLS (TIU)
VA-PAIN (TIU)
VA-LIVING SITUATION (TIU)
VA-LIFE SPACE (TIU)
VA-GEC BEHAVIOR (TIU)
PRIMARY LANGUAGE (TIU)
VA-LEVEL OF EDUCATION (TIU)
```

TIU DOCUMENT DEFINITION
```
VA-KATZ ADL
IADL
VA-DWS
VA-FALLS
VA-PAIN
VA-LIVING SITUATION
VA-LIFE SPACE
VA-GEC BEHAVIOR
PRIMARY LANGUAGE
VA-LEVEL OF EDUCATION
```

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_41.PRD

If your site is having issues using LWH, please send us message in outlook and provide your vista mail address and we will send to you. You can send your test account or production account address. Just be sure to install into your test account first which may mean you will have to use reminder exchange to send from production to test, depending on which vista address you provide us. You can email Alan Montgomery, Elizabeth Griffith or Stephanie Smalley.

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

```
+          + 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         LWH  Load Web Host File
DFE  Delete Exchange File Entry     RI   Reminder Definition Inquiry
IFE  Install Exchange File Entry    RP   Repack
IH   Installation History
Select Action: Next Screen// lwh   Load Web Host File
Input the URL for the .prd file: http://vista.med.va.gov/reminders/UPDATE_2_0_41.PRD
```

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_41.PRD

```
http://vista.med.va.gov/reminders/UPDATE_2_0_41.PRD successfully loaded.
```

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_41 FUNCTIONAL AND PSYCHOSOCIAL TEMPLATE in reminder exchange

```
+Item  Entry                        Source                Date Packed
   362  UPDATE_2_0_41 FUNCTIONAL AND MONTGOMERY@SALT LAKE CI  03/02/2018@08:26
        PSYCHOSOCIAL TEMPLATE
   363  UPDATE_2_0_41 FUNCTIONAL AND MONTGOMERY@SALT LAKE CI  03/05/2018@11:08
        PSYCHOSOCIAL TEMPLATE
   364  UPDATE_2_0_41 FUNCTIONAL AND MONTGOMERY@SALT LAKE CI  04/10/2018@08:25
        PSYCHOSOCIAL TEMPLATE
   365  UPDATE_2_0_41 FUNCTIONAL AND MONTGOMERY@SALT LAKE CI  08/07/2018@08:20
        PSYCHOSOCIAL TEMPLATE
   366  UPDATE_2_0_41 FUNCTIONAL AND MONTGOMERY@SALT LAKE CI  10/02/2018@10:29
        PSYCHOSOCIAL TEMPLATE
+          + 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         LWH  Load Web Host File
DFE  Delete Exchange File Entry     RI   Reminder Definition Inquiry
IFE  Install Exchange File Entry    RP   Repack
IH   Installation History
Select Action: Next Screen// 366
Select Action: :   (IFE/DFE/IH): IFE//
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry titled UPDATE_2_0_41 FUNCTIONAL AND
PSYCHOSOCIAL TEMPLATE *dated 10/02/2018@10:29:30 (in this example it is entry 366, it
will vary by site)*

```
        Component                                       Category    Exists
 Source:      MONTGOMERY,ALAN at SALT LAKE CITY
 Date Packed: 10/02/2018@10:29:30
 Package Version: 2.0P35


 Description:
 The following Clinical Reminder items were selected for packing:
 REMINDER DIALOG
   VA-FUNCTIONAL AND PSYCHOSOCIAL


 REMINDER TERM
   VA-UPDATE_2_0_41
   VA-HEALTH AND WELL BEING


 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 see several prompts, for all new entries you will choose I to Install :
Select Action: Next Screen// IA   Install all Components

You will be prompted to install the reminder dialog component:

```
Packed reminder dialog: VA-FUNCTIONAL AND PSYCHOSOCIAL [NATIONAL DIALOG]


 Item  Seq. Dialog Findings                              Type    Exists
   1     VA-FUNCTIONAL AND PSYCHOSOCIAL                   dialog


   2    2 VA-GEC GP NOTE TITLE AND INSTRUCTIONS           group
           Finding: *NONE*
   3    2.5 VA-GEC GP NOTE INSTRUCTIONS                   group
           Finding: *NONE*
   4    2.5.5 VA-GEC NOTE INSTRUCTIONS EL                 element
           Finding: *NONE*


   5    5 VA-GEC GP LANGUAGE SPOKEN*                      group
           Finding: *NONE*
   6    5.10 VA-GEC GP LANGUAGE PRIMARY ENGLISH           group
           Finding: PRIMARY LANGUAGE ENGLISH (HEALTH FACTOR)         X
   7    PXRM COMMENT                                      prompt    X
   8    5.10.10 VA-GEC BLANK ROW NOTE                     element
+          + 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-FUNCTIONAL AND PSYCHOSOCIAL**
Select Action: Next Screen// IA   Install All
All dialog components for VA-FUNCTIONAL AND PSYCHOSOCIAL are new.
Install reminder dialog and all components with no further changes: Y// Yes

In general terms, if a component is NEW, use the INSTALL action
If a component exists, but is different, use the OVERWRITE action

---

If you feel that a template field shouldn't be overwritten, you have the option to SKIP. This can always be reinstalled and overwritten at any time.

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

   2     2 VA-GEC GP NOTE TITLE AND INSTRUCTIONS                group      X
             Finding: *NONE*
   3     2.5 VA-GEC GP NOTE INSTRUCTIONS                        group      X
             Finding: *NONE*
   4     2.5.5 VA-GEC NOTE INSTRUCTIONS EL                      element    X
             Finding: *NONE*

   5     5 VA-GEC GP LANGUAGE SPOKEN*                           group      X
             Finding: *NONE*
   6     5.10 VA-GEC GP LANGUAGE PRIMARY ENGLISH                group      X
             Finding: PRIMARY LANGUAGE ENGLISH (HEALTH FACTOR)             X
   7     PXRM COMMENT                                           prompt     X
   8     5.10.10 VA-GEC BLANK ROW NOTE                          element    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
```

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 prompted to install the health summary components. Choose **I** to install when prompted.

```
     Component                                          Category    Exists
  Source:      MONTGOMERY,ALAN at SALT LAKE CITY
  Date Packed: 10/02/2018@10:29:30
  Package Version: 2.0P35


  Description:
  The following Clinical Reminder items were selected for packing:
  REMINDER DIALOG
    VA-FUNCTIONAL AND PSYCHOSOCIAL


  REMINDER TERM
    VA-UPDATE_2_0_41
    VA-HEALTH AND WELL BEING


  Keywords:


  Components:
  +           Enter ?? for 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 <mark>**Q.**</mark>

Install complete.

Post Installation

1. **Make the Dialog able to be attached to a Personal/Shared template or to a progress note title.**
   From the Reminders Manager Menu:
   Select Reminder Managers Menu Option: <mark>**CP CPRS Reminder Configuration**</mark>
      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
      <mark>TIU   TIU Template Reminder Dialog Parameter</mark>
      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
*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 number 150 is not present, so I will use 150.*
Select Display Sequence: **150**
Are you adding 150 as a new Display Sequence? Yes// **Y YES**
Display Sequence: 150// **<Enter>**   150
Clinical Reminder Dialog**: type in the name of the dialog**

VA-FUNCTIONAL AND PSYCHOSOCIAL then **<enter>** reminder dialog
NATIONAL
OK? Yes// **<Enter>** (Yes)

2. **Setup of Note titles**
    The functional review can be set up as a shared template or a note title. Whatever best fits your sites local workflow.

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 or shared template in CPRS.**
    To do this, go to Template Editor, then either Shared templates or Document Titles, select the appropriate folder
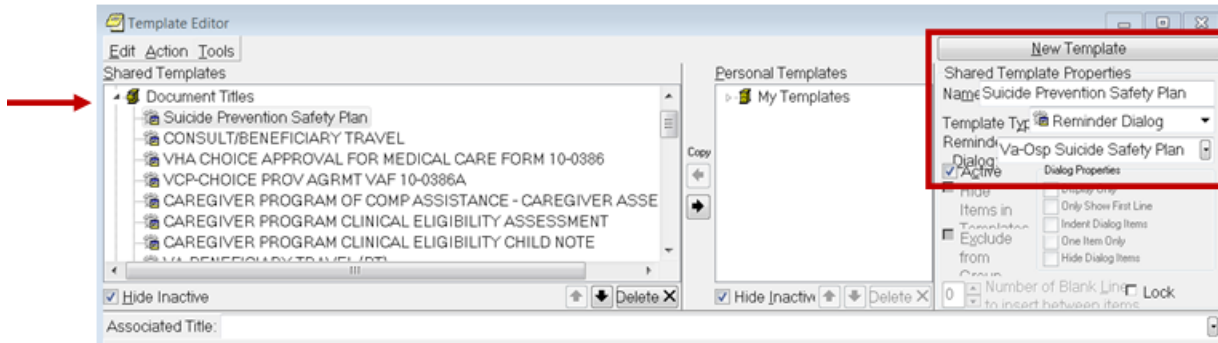   (if applicable), and choose New Template (top right-hand corner).
    1. Type in the following information:
                    Name: **Functional Review**
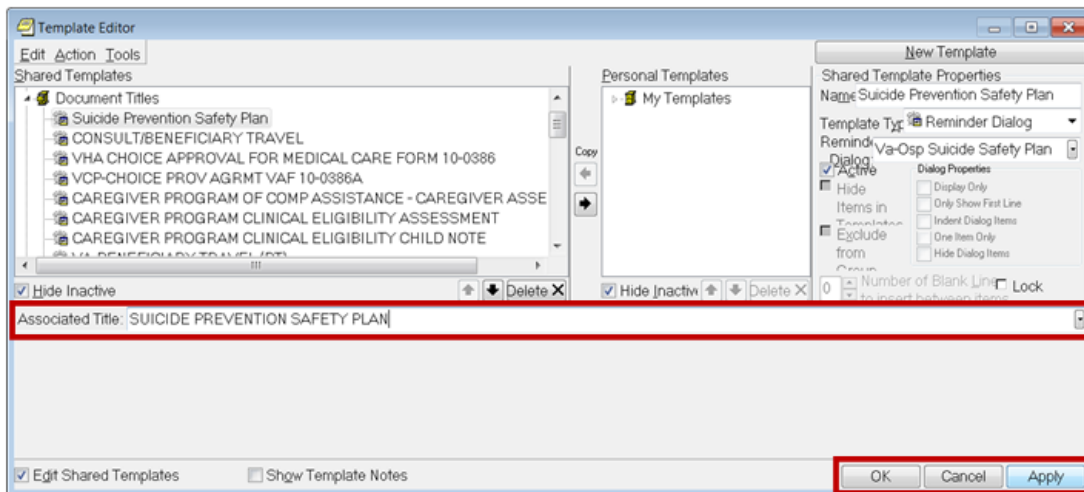   Template Type: **Reminder Dialog**
           Reminder Dialog: VA-FUNCTIONAL AND PSYCHOSOCIAL

If you are attaching to a document title, enter the appropriate note title.

Hit Apply and OK.

4. **Add your existing health Factors to the reminder terms and data objects.**
   There are several sections that look back to see if documentation has been enterred previously, you can map your local health factors *if you have them* to these reminder terms and data objects so they will display if entered previously. It would be beneficial to open up and review this template to identify the types of information in each section so that you can compare to local existing templates and see if you have any comparable health factors. Not every section on the template is represented here. The sections that use a standard national tool should not need to be edited.

   a. **LANGUAGE**
      1. **Enter your local health factors for PRIMARY LANGUAGE to the reminder term VA-BL PRIMARY LANGUAGE**
         This term will install with the following health factors. You can add to the term but please do not remove the existing findings.
         ```
         Finding Item: PRIMARY LANGUAGE IS NOT ENGLISH (FI(1)=HF(8234))
         Finding Type: HEALTH FACTOR
         Health Factor Category: LEARNING CHARACTERISTICS
         ```

```
         Within Category Rank: 0

      Finding Item: PRIMARY LANGUAGE ENGLISH (FI(2)=HF(8236))
      Finding Type: HEALTH FACTOR
 Health Factor Category: LEARNING CHARACTERISTICS
      Within Category Rank: 0
```

2. If you added any health factors to this term, also add them to the health summary type VA-PRIMARY LANGUAGE

```
Select Build Health Summary Type Menu <TEST ACCOUNT> Option: 1
Create/Modify Health Summary Type

Select Health Summary Type: VA-PRIMARY LAN

  VA-Primary Language (Primary Language)

  OK?  YES//   VA-PRIMARY LANGUAGE

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-PRIMARY LANGUAGE//
TITLE: Primary Language//
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:
SUPPRESS SENSITIVE PRINT DATA:
LOCK:
OWNER:

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

                    HEALTH SUMMARY TYPE INQUIRY

          Type Name:  VA-PRIMARY LANGUAGE
              Title:  Primary Language
              Owner:
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:
SUPPRESS SENSITIVE PRINT DATA:


                                    Max          Hos  ICD   Pro
CPT
Abb   Ord    Component Name         Occ  Time   Loc  Text  Nar
Mod   Selection
   ------------------------------------------------------------------
SHF    5       Health Factor Select 1

PRIMARY LANGUAGE ENGLISH

PRIMARY LANGUAGE IS NOT ENGLIS
```

```
                           * = Disabled Components
              Select COMPONENT: SHF  PCE HEALTH FACTORS SELECTED SHF
              PCE HEALTH FACTORS SELECTED is already a component of this
              summary.

                   Select one of the following:

                        E          Edit component parameters
                        D          Delete component from summary

              Select Action: Edit component parameters
              SUMMARY ORDER: 5// 5
              OCCURRENCE LIMIT: 1//
              TIME LIMIT:
              HEADER NAME: Health Factor Select  Replace

              Current selection items are:  PRIMARY LANGUAGE ENGLISH
                                            PRIMARY LANGUAGE IS NOT ENGLISH


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

              Select SELECTION ITEM: PRIMARY LANGUAGE IS NOT ENGLISH
                                 //ADD YOUR HF HERE
```

b. LEVEL OF EDUCATION
1. **Enter your local health factors that represent Level of education to the reminder term VA-BL LEVEL OF EDUCATION**
This term will install with the following health factors. You can add to the term but please do not remove the existing findings.

```
      Finding Item: EDUCATION <9TH GRADE (FI(1)=HF(8359))
      Finding Type: HEALTH FACTOR
Health Factor Category: LEVEL OF EDUCATION
  Within Category Rank: 0

          Finding Item: EDUCATION 9-12 GRADE (FI(2)=HF(8360))
          Finding Type: HEALTH FACTOR
Health Factor Category: LEVEL OF EDUCATION
  Within Category Rank: 0

          Finding Item: EDUCATION >12TH GRADE (FI(3)=HF(8361))
          Finding Type: HEALTH FACTOR
Health Factor Category: LEVEL OF EDUCATION
          Within Category Rank: 0
```

2. **If you added any health factors to this term, also add them to the health summary type VA-LEVEL OF EDUCATION**

```
Select Build Health Summary Type Menu <TEST ACCOUNT> Option: 1
Create/Modify Health Summary Type

Select Health Summary Type: VA-LEVEL OF

   VA-Level of Education (Level of Education)

   OK?  YES//   VA-LEVEL OF EDUCATION

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-LEVEL OF EDUCATION  Replace
TITLE: Level of Education//
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes//
SUPPRESS SENSITIVE PRINT DATA:
LOCK:
OWNER: GRIFFITH,ELIZABETH A//

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

                    HEALTH SUMMARY TYPE INQUIRY


         Type Name:  VA-LEVEL OF EDUCATION
             Title:  Level of Education
             Owner:  GRIFFITH,ELIZABETH A
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
------------------------------------------------------------------
SHF   5         Health Factor Select

LEVEL OF EDUCATION

              * = Disabled Components
Select COMPONENT: SHF   PCE HEALTH FACTORS SELECTED SHF
PCE HEALTH FACTORS SELECTED is already a component of this
summary.

     Select one of the following:

          E          Edit component parameters
          D          Delete component from summary

Select Action: Edit component parameters
SUMMARY ORDER: 5// 5
```

```
        OCCURRENCE LIMIT:
        TIME LIMIT:
        HEADER NAME: Health Factor Select  Replace

        Current selection items are:  LEVEL OF EDUCATION


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

        Select SELECTION ITEM: LEVEL OF EDUCATION //  ADD YOUR HF HERE
        Select COMPONENT:
```

c. LIVING SITUATION
   1. **Enter your local health factors that represent who the Veteran lives with to the reminder term VA-BL LIVING SITUATION**
      Add a beginning date and time of T-1Y
      This term will install with the following health factors. You can add to the term but please do not remove the existing findings.

```
    Finding Item: LIVES ALONE (FI(1)=HF(8735))
           Finding Type: HEALTH FACTOR
Health Factor Category: LIVING SITUATION
   Beginning Date/Time: T-1Y
  Within Category Rank: 0

           Finding Item: LIVES WITH SPOUSE/SIGNIFICANT OTHER
                         (FI(2)=HF(8736))
           Finding Type: HEALTH FACTOR
Health Factor Category: LIVING SITUATION
   Beginning Date/Time: T-1Y
  Within Category Rank: 0

           Finding Item: LIVES WITH CHILD (FI(3)=HF(8737))
           Finding Type: HEALTH FACTOR
Health Factor Category: LIVING SITUATION
   Beginning Date/Time: T-1Y
  Within Category Rank: 0

           Finding Item: LIVES WITH FRIEND (FI(4)=HF(8738))
           Finding Type: HEALTH FACTOR
Health Factor Category: LIVING SITUATION
   Beginning Date/Time: T-1Y
  Within Category Rank: 0

           Finding Item: LIVES WITH OTHER (FI(5)=HF(8739))
           Finding Type: HEALTH FACTOR
Health Factor Category: LIVING SITUATION
   Beginning Date/Time: T-1Y
```

Within Category Rank: 0

2. If you added any health factors to this term, also add them to the health summary type VA-LIVING SITUATION

Select Build Health Summary Type Menu <TEST ACCOUNT> Option: 1
Create/Modify Health Summary Type
Select Health Summary Type: VA-LIVING SITUATION

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-LIVING SITUATION//
TITLE: Living Situation//
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes//
SUPPRESS SENSITIVE PRINT DATA:
LOCK:
OWNER: GRIFFITH,ELIZABETH A//

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

                    HEALTH SUMMARY TYPE INQUIRY

        Type Name: VA-LIVING SITUATION
            Title: Living Situation
            Owner: GRIFFITH,ELIZABETH A
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

SHF   5   Health Factor Select

LIVING SITUATION

              * = Disabled Components
Select COMPONENT: SHF   PCE HEALTH FACTORS SELECTED SHF
PCE HEALTH FACTORS SELECTED is already a component of this
summary.

     Select one of the following:

          E   Edit component parameters
          D   Delete component from summary

Select Action: Edit component parameters
SUMMARY ORDER: 5// 5
OCCURRENCE LIMIT:

```
           TIME LIMIT:
           HEADER NAME: Health Factor Select  Replace


           Current selection items are:  LIVING SITUATION



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

           Select SELECTION ITEM: LIVING SITUATION// ADD YOUR HF HERE
```

d. FALLS
   1. Enter your local health factors that represent if the Veteran has had a fall to the reminder term VA-BL FALLS
   Add a beginning date and time of T-1Y
   This term will install with the following health factors. You can add to the term but please do not remove the existing findings.

```
           Finding Item: FALL - MORE THAN ONE IN LAST YEAR
                         (FI(1)=HF(8754))
           Finding Type: HEALTH FACTOR
Health Factor Category: FALL
   Beginning Date/Time: T-1Y
  Within Category Rank: 0

           Finding Item: FALL - NONE IN PAST YEAR (FI(2)=HF(8753))
           Finding Type: HEALTH FACTOR
Health Factor Category: FALL
   Beginning Date/Time: T-1Y
  Within Category Rank: 0

           Finding Item: FALL - ONE IN LAST YEAR (FI(3)=HF(8752))
           Finding Type: HEALTH FACTOR
Health Factor Category: FALL
   Beginning Date/Time: T-1Y
              Within Category Rank: 0
```

```
   1. If you added any health factors to this term, also add them to
      the health summary type VA-FALLS

   Select Build Health Summary Type Menu <TEST ACCOUNT> Option: 1
   Create/Modify Health Summary Type

   Select Health Summary Type: VA-FALLS  VA-FALLS

   2 Health Summary Types found

      1.  VA-Falls (Falls within the Past Year)
      2.  Vanod Falls Interventions
```

```
        Select 1-2:  1

        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-FALLS//
        TITLE: Falls within the past year  Replace
        SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes//
        SUPPRESS SENSITIVE PRINT DATA:
        LOCK:
        OWNER: GRIFFITH,ELIZABETH A//

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

                          HEALTH SUMMARY TYPE INQUIRY

              Type Name:  VA-FALLS
                  Title:  Falls within the past year
                  Owner:  GRIFFITH,ELIZABETH A
        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
        --------------------------------------------------------------------
        SHF   5       Health Factor Select      1Y


        FALL
                       * = Disabled Components
        Select COMPONENT: SHF   PCE HEALTH FACTORS SELECTED SHF
        PCE HEALTH FACTORS SELECTED is already a component of this
        summary.

            Select one of the following:

                    E         Edit component parameters
                    D         Delete component from summary

        Select Action: Edit component parameters
        SUMMARY ORDER: 5// 5
        OCCURRENCE LIMIT:
        TIME LIMIT: 1Y//
        HEADER NAME: Health Factor Select  Replace

        Current selection items are:  FALL

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

```
                    Select SELECTION ITEM: FALL// ADD YOUR HF HERE
```
5. **Add the orderable items within the dialog:**
   There are several sections for referrals, these groups and elements are all classified as local so that you can update or add to or remove elements if needed. You can also disable the specific elements if your site does not have a referral or consult for the service indicated. Please review with your local services to determine what would be the appropriate order for each section.

   Using the menu, Reminder Dialog Management, Reminder Dialogs, Change the view to dialog and search for the reminder dialog VA-FUNCTIONAL AND PSYCHOSOCIAL. Within that dialog, you can Search for the following components and edit.

   - Add a quick order that represents a referral or consult to social work as an additional finding to the element VAL-GEC SOCIAL WORK . This is a local element and you can change the wording if appropriate to best match your local service. Consult with your Social work service to determine the best option.
   - Add the menu name for your consult menu to the option `VAL-GEC OTHER REFERRAL` if appropriate. In the dialog, this represents Other Referral/Consult. If you do not want a menu to automatically open when the user clicks finish, do not map anything.
   - Add a quick order that represents a referral or consult to Physical Medicine and Rehabilitation as an additional finding to the element VAL-GEC PM&R REFERRAL. This is a local element and you can change the wording if appropriate to best match your local service.
   - Add a quick order that represents a referral or consult to your Fall Clinic as an additional finding to the element VAL-GEC FALL REFERRAL. This is a local element and you can change the wording if appropriate to best match your local service. You can also disable this element if your site does not offer this service.
   - Add a quick order that represents a referral or consult for Geriatric Evaluation as an additional finding to the element VAL-GEC GERIATRIC REFERRAL. This is a local element and you can change the wording if appropriate to best match your local service. You can also disable this element if your site does not offer this service.
   - Add a quick order that represents a referral or consult to your Dementia Clinic as an additional finding to the element VAL-GEC DEMENTIA CLINIC. This is a local element and you can change the wording if appropriate to best match your local service. You can also disable this element if your site does not offer this service.
   - Add a quick order that represents a referral or consult to Behavioral Health as an additional finding to the element VAL-GEC BEHAVIORAL HEALTH REFERRAL. This is a local element and you can change the wording if appropriate to best match your local service.

6. **If you want to suppress the ordering options in the dialog**, then you will need to update the following term:

VA-GEC ORDER SUPPRESSION

To suppress the referral dialog groups for specific user classes: VA-ASU USER CLASS Enter the user class that should NOT see the dialog element. If more than one user class is needed, add additional findings of the CF VA-ASU USER CLASS for each one as needed.

To suppress the referral dialog groups for all users: VA-AGE change the < sign to a > sign in the CF for patient age.

To suppress for specific user classes, in the above Terms configure the VA-ASU USER CLASS computed finding and DELETE the VA-AGE finding. **NOTE: If the Age finding is not deleted, the user class settings will not work.**

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