

# **Department of Veterans Affairs**

## **VistA Scheduling Enhancements (VSE)**

### **Version Description Document**



**April 2016**

## Revision History

Note: The revision history cycle begins once changes or enhancements are requested after the document has been baselined.

<b>Date</b>	<b>Version</b>	<b>Description</b>	<b>Author</b>
4/17/2016	1.2	Internal Peer Review Complete	M. Woehrle, PM
04/07/2016	1.1	Updated with all the VSE patch descriptions	C. Rodríguez, Dev
01/29/2016	1.0	Initial Version for Submission	D. Vick, PM; M. Woehrle, PM/Sr. BA S. Nannapaneni G. Scorca, Sr. TW

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# 1. Scope

This Version Description Document (VDD) is the documentation provided by Configuration Management (CM) to certify the integrity of the deliverable that's being handed off from the VistA Scheduling Enhancements (VSE) team. This includes all the approved Change Requests.

The VDD is not a Release Notes document as the Department of Veterans Affairs (VA) historically has known the developer/support person to collaborate on as part of our basic (user, technical, and installation) documentation packet. These documents speak to additional functionality, changes in the technical infrastructure, and business purpose/mandate for a release. Its presence does not supersede the need for the user-friendly Release Notes that highlight the major functional or operational changes. Release Notes are included as part of the VDD in Appendix A. The VDD is the inventory document for the Production deployment similar to how a packing list is to a Received Shipment, or a Bill of Lading. It itemizes the differences between previous and current deliverables in terms of change orders implemented, and provides a sign-off statement from the Configuration Management (CM) VSE team, following required Changes and Configuration Management procedures in order to handoff the deliverable and approved changes properly.

This release consists of the following M patches GMRC\*3.0\*83, SD\*5.3\*627, SD\*5.3\*628, SD\*5.3\*642, SD\*5.3\*643, SD\*5.3\*645) and the Graphical User Interface (GUI) executable VS GUI v2.0.0.5.

The M patches are distributed via FORUM. This database is used for distribution of the nationally released patches to the VA sites.

The VS GUI application package is delivered through Secure File Transfer Protocol (SFTP) to the sites Office of Information and Technology (OI&T) office personnel and the VS GUI application components are versioned in the Rational Team Concert (RTC) Change and Configuration Management (CCM) Tool.

## 2. Version Description

The VS GUI application is registered under Scheduling Project.

**Table 1: Version Description**

Item	Description
CCM	<a href="https://ccm.rational.oit.va.gov:9443/ccm/">https://ccm.rational.oit.va.gov:9443/ccm/</a>
Access	Contact the VA Rational Tools team
Project Area	Scheduling (CM)
Team Area	N/A
Stream	Scheduling VistA Scheduling Enhancements 2.0
Baseline	34:VS_GUI_2.0.0build5
Build Label	Build version format is x.x.x.x
Components	Scheduling VistA Scheduling Enhancements
Build Definition	Builds produce .dll files and other static content files.
Build Output	Output directory
Build Output Directory	CCM\Scheduling VistA Scheduling Enhancements\
Deployment Location	See Table 2
Status	VS GUI v2.0.0.5, GMRC*3.0*83, SD*5.3*642, SD*5.3*643, SD*5.3*645, SD*5.3*627 and SD*5.3*628 will be implemented at all sites nationally.

### 3. Release Inventory

Vista Scheduling GUI files are stored and distributed from a SFTP server, access to which is granted to sites in accordance with the schedule.

**Table 2: Inventory of Release Components**

Release Component	Description	Method of Delivery	Recipient	Location
GMRC*3.0*83 v2	VSE OT4 Enhancement	Electronic	Local OI&T Eventually the patch will go to every Veteran's Administration Medical Center (VAMC) in the country	FORUM.VA.GOV
SD*5.3*627v50	VSE OT4 Enhancement	Electronic	Local OI&T Eventually the patch will go to every Veteran's Administration Medical Center (VAMC) in the country	FORUM.VA.GOV
SD*5.3*628 v16	VSE OT4 Enhancement	Electronic	Local OI&T Eventually the patch will go to every Veteran's Administration Medical Center (VAMC) in the country	FORUM.VA.GOV
SD*5.3*643 v3	VSE OT4 Enhancement	Electronic	Local OI&T Eventually the patch will go to every Veteran's Administration Medical Center (VAMC) in the country	FORUM.VA.GOV
SD*5.3*642 v9	VSE OT4 Enhancement	Electronic	Local OI&T Eventually the patch will go to every Veteran's Administration Medical Center (VAMC) in the country	FORUM.VA.GOV

Release Component	Description	Method of Delivery	Recipient	Location
SD*5.3*645 v4	VSE OT4 Enhancement	Electronic	Local OI&T Eventually the patch will go to every Veteran's Administration Medical Center (VAMC) in the country	FORUM.VA.GOV
SD_53_P642_5.zip (VS GUI v2.0.0.5)	VistA Scheduling GUI executable	Electronic	Local OI&T	FTP site: <a href="ftp://download.vista.med.va.gov">ftp://download.vista.med.va.gov</a> Albany ftp.fo-albany.med.va.gov Hines ftp.fo-hines.med.va.gov Salt Lake City ftp.fo-slc.med.va.gov  ANONYMOUS.PUB.VSE

### 3.1. Electronic Media Released

There is no electronic media provided with this deliverable. For additional information refer to [Table 3: Inventory of Release Components](#).

### 3.2. Physical Media Released

There is no Physical media provided with this deliverable.

## 4. Associated Supporting Documentation

The following support documents are associated with this deliverable.

**Table 3: Associated Supporting Documentation**

Document Name	Revision	Date
VSE__Conting_Plan_and_DRP.docx	4.0	12/24/2015
VSE__Deployment_Plan.docx		1/29/2016
VSE_SG.docx	3.0	12/24/2015
VSE__TM.docx	5.0	12/03/2015
VSE__UG.docx	3.0	10/01/2015
VSE__RSD.docx	4.5	10/29/2015
VSE__RTM.xlsx	5.0	1/29/2016
VSE_MTP.docx	2.3	11/18/2015
VS GUI Installation Guide.docx	5.0	3/31/2016

# 5. Patch Description(s)

## 5.1. SD\*5.3\*627

```
=====
Run Date: APR 17, 2016                               Designation: SD*5.3*627
Package : SCHEDULING                                 Priority  : MANDATORY
Version : 5.3                                         Status   : COMPLETE/NOT RELEASED
=====

Associated patches: (v)SD*5.3*132 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*257 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*446 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*478 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*536 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*544 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*545 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*567 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*568 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*582 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*586 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*592 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*622 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*630 <=< must be installed BEFORE `SD*5.3*627'
                   (v)SD*5.3*635 <=< must be installed BEFORE `SD*5.3*627'
                   (c)GMRC*3*83  <=< must be installed BEFORE `SD*5.3*627'

Subject: VISTA SCHEDULING ENHANCEMENT E1-E2

Category:  ROUTINE
           DATA DICTIONARY
           OTHER
           ENHANCEMENT
           INPUT TEMPLATE

Description:
=====

The Veterans Health Administration (VHA) Access and Clinic Administrative
Program (ACAP) has requested an enterprise enhancement for the
VistA Scheduling Package. The enhancement will reduce operating cost for
VHA and improve operational efficiencies resulting in patient centered
access to care, coordinated care, increased customer satisfaction, and
the reduction of excessive cycle/wait time used for scheduling patients.

The following patches along with VS GUI v2.0.0.5 provide a Vista
Scheduling (VS) Graphical User Interface (GUI) for the Patient
Information Management Systems (PIMS) Scheduling package:

GMRC*3.0*83
SD*5.3*627 (This patch)
SD*5.3*628
SD*5.3*643
SD*5.3*642
SD*5.3*645

*****
*           PLEASE TAKE NOTE OF THE FOLLOWING CHANGE           *
*                                                                 *
* The option 'Multiple Clinic Display/Booking' [SDMULTICLINIC] must be *
* disabled because it is not compatible with the changes distributed in *
* this patch. OI&T must use 'Edit Options' under 'Menu Management' in *
* EVE to mark [SDMULTICLINIC] as 'Out of Order'. *
*                                                                 *
*****
```

Patch Components  
 =====

Files & Fields Associated:

File Name (#) -----	Field Name (#) -----	NEW/MODIFIED/DELETED -----
HOSPITAL LOCATION (#44)	NAME (#.01)	Modified
HOSPITAL LOCATION (#44)	TYPE (#2)	Modified
PRIVILED USER SUB-FILE (#44.04)	PRIVILEGED USER (#.01)	Modified
PROVIDER SUB-FILE (#44.1)	PROVIDER (#.01)	Modified
RECALL REMINDERS (#403.5)	USER WHO ENTERED RECALL (#7)	Modified
RECALL REMINDERS (#403.5)	DATE/TIME RECALL ADDED (#7.5)	New
RECALL REMINDERS REMOVED (#403.56)	USER WHO ENTERED RECALL (#7)	Modified
RECALL REMINDERS REMOVED (#403.56)	DATE/TIME RECALL ADDED (#7.5)	New
SD WAIT LIST (#409.3)	ORIGINATING DATE (#1)	Modified
SD WAIT LIST (#409.3)	WL SPECIFIC HOSPITAL LOCATION (#8.5)	New
SD WAIT LIST (#409.3)	DATE/TIME ENTERED (#9.5)	New
SD WAIT LIST (#409.3)	ENROLLMENT PRIORITY (#10.5)	New
SD WAIT LIST (#409.3)	CURRENT STATUS (#23)	Modified
SD WAIT LIST (#409.3)	PATIENT CONTACT (#44)	New
SDEC APPLICATION (#409.81)	MAJOR VERSION (#.01)	New
SDEC APPLICATION (#409.81)	MINOR VERSION (#.02)	New
SDEC APPLICATION (#409.81)	BUILD (#.03)	New
SDEC ACCESS BLOCK (#409.821)	RESOURCE (#.01)	New
SDEC ACCESS BLOCK (#409.821)	STARTTIME (#.02)	New
SDEC ACCESS BLOCK (#409.821)	ENDTIME (#.03)	New
SDEC ACCESS BLOCK (#409.821)	SLOTS (#.04)	New
SDEC ACCESS BLOCK (#409.821)	ACCESS TYPE (#.05)	New
SDEC ACCESS BLOCK (#409.821)	NOTE (#1)	New
SDEC ACCESS GROUP (#409.822)	ACCESS GROUP (#.01)	New
SDEC ACCESS TYPE (#409.823)	ACCESS TYPE NAME (#.01)	New
SDEC ACCESS TYPE (#409.823)	INACTIVE (#.02)	New
SDEC ACCESS TYPE (#409.823)	DEPARTMENT NAME (#.03)	New
SDEC ACCESS TYPE (#409.823)	DISPLAY COLOR (#.04)	New
SDEC ACCESS TYPE (#409.823)	RED (#.05)	New
SDEC ACCESS TYPE (#409.823)	GREEN (#.06)	New

SDEC ACCESS TYPE (#409.823)	BLUE (#.07)	New
SDEC ACCESS TYPE (#409.823)	PREVENT ACCESS (#.08)	New
SDEC ACCESS GROUP TYPE (#409.824)	ACCESS GROUP (#.01)	New
SDEC ACCESS GROUP TYPE (#409.824)	ACCESS TYPE (#.02)	New
SDEC RESOURCE (#409.831)	RESOURCE (#.01)	New
SDEC RESOURCE (#409.831)	RESOURCE TYPE (#.012)	New
SDEC RESOURCE (#409.831)	DATE/TIME ENTERED (#.015)	New
SDEC RESOURCE (#409.831)	ENTERED BY USER (#.016)	New
SDEC RESOURCE (#409.831)	INACTIVE (#.02)	New
SDEC RESOURCE (#409.831)	INACTIVATED DATE/TIME (#.021)	New
SDEC RESOURCE (#409.831)	INACTIVATED BY USER (#.022)	New
SDEC RESOURCE (#409.831)	REACTIVATED DATE/TIME (#.025)	New
SDEC RESOURCE (#409.831)	REACTIVATED BY USER (#.026)	New
SDEC RESOURCE (#409.831)	TIME SCALE (#.03)	New
SDEC RESOURCE (#409.831)	HOSPITAL LOCATION (#.04)	New
SDEC RESOURCE (#409.831)	LETTER TEXT (#1)	New
SDEC RESOURCE (#409.831)	NO SHOW LETTER (#1201)	New
SDEC RESOURCE (#409.831)	CLINIC CANCELLATION LETTER (#1301)	New
SDEC RESOURCE (#409.831)	ASSOCIATED VISTA CLINICS (#2001)	New
SDEC RESOURCE GROUP (#409.832)	NAME (#.01)	New
SDEC RESOURCE GROUP (#409.832)	INACTIVATION DATE (#.02)	New
SDEC RESOURCE GROUP (#409.832)	RESOURCE (#1)	New
SDEC RESOURCE USER (#409.832)	RESOURCENAME (#.01)	New
SDEC RESOURCE USER (#409.833)	USERNAME (#.02)	New
SDEC RESOURCE USER (#409.833)	OVERBOOK (#.03)	New
SDEC RESOURCE USER (#409.833)	MODIFY SCHEDULE (#.04)	New
SDEC RESOURCE USER (#409.833)	MODIFY APPOINTMENTS (#.05)	New
SDEC RESOURCE USER (#409.833)	MASTEROVERBOOK (#.06)	New
SDEC ADDITIONAL RESOURCE (#409.834)	NAME (#.01)	New
SDEC ADDITIONAL RESOURCE (#409.834)	INACTIVE (#2)	New
SDEC APPOINTMENT (#409.84)	STARTTIME (#.01)	New
SDEC APPOINTMENT (#409.84)	ENDTIME (#.02)	New
SDEC APPOINTMENT (#409.84)	CHECKIN (#.03)	New
SDEC APPOINTMENT (#409.84)	CHECK IN TIME ENTERED (#.04)	New
SDEC APPOINTMENT	PATIENT	New

(#409.84)	(#.05)	
SDEC APPOINTMENT	ACCESS TYPE ID	New
(#409.84)	(#.06)	
SDEC APPOINTMENT	RESOURCE	New
(#409.84)	(#.07)	
SDEC APPOINTMENT	DATA ENTRY CLERK	New
(#409.84)	(#.08)	
SDEC APPOINTMENT	DATE APPT MADE	New
(#409.84)	(#.09)	
SDEC APPOINTMENT	NOSHOW	New
(#409.84)	(#.1)	
SDEC APPOINTMENT	NOSHOW DATE/TIME	New
(#409.84)	(#.101)	
SDEC APPOINTMENT	NOSHOW BY USER	New
(#409.84)	(#.102)	
SDEC APPOINTMENT	REBOOK DATETIME	New
(#409.84)	(#.11)	
SDEC APPOINTMENT	CANCEL DATETIME	New
(#409.84)	(#.12)	
SDEC APPOINTMENT	CANCELLED BY USER	New
(#409.84)	(#.121)	
SDEC APPOINTMENT	CANCELLATION REASON	New
(#409.84)	(#.122)	
SDEC APPOINTMENT	WALKIN	New
(#409.84)	(#.13)	
SDEC APPOINTMENT	CHECKOUT	New
(#409.84)	(#.14)	
SDEC APPOINTMENT	V PROVIDER IEN	New
(#409.84)	(#.15)	
SDEC APPOINTMENT	PROVIDER	New
(#409.84)	(#.16)	
SDEC APPOINTMENT	STATUS	New
(#409.84)	(#.17)	
SDEC APPOINTMENT	LENGTH OF APPT	New
(#409.84)	(#.18)	
SDEC APPOINTMENT	PREV APPT STATUS	New
(#409.84)	(#.19)	
SDEC APPOINTMENT	DESIRED DATE OF APPOINTMENT	New
(#409.84)	(#.2)	
SDEC APPOINTMENT	EXTERNAL ID	New
(#409.84)	(#.21)	
SDEC APPOINTMENT	APPT REQUEST TYPE	New
(#409.84)	(#.22)	
SDEC APPOINTMENT	NOTE	New
(#409.84)	(#1)	
SDEC PREFERENCES AND SPECIAL PATIENT		New
(#409.845)	(#.01)	
SDEC PREFERENCES AND SPECIAL PREFERENCES		New
(#409.845)	(#1)	
PREFERENCES SUB-FILE	PREFERENCE	New
(#409.8451)	(#.01)	
PREFERENCES SUB-FILE	DATE/TIME ADDED	New
(#409.8451)	(#2)	
PREFERENCES SUB-FILE	ADDED BY USER	New
(#409.8451)	(#3)	
PREFERENCES SUB-FILE	INACTIVE DATE	New
(#409.8451)	(#4)	
PREFERENCES SUB-FILE	INACTIVATED BY USER	New
(#409.8451)	(#5)	
PREFERENCES SUB-FILE	REMARKS	New
(#409.8451)	(#6)	
SDEC APPT REQUEST	PATIENT	New
(#409.85)	(#.01)	
SDEC APPT REQUEST	CREATE DATE	New
(#409.85)	(#1)	
SDEC APPT REQUEST	INSTITUTION	New
(#409.85)	(#2)	
SDEC APPT REQUEST	REQUEST TYPE	New
(#409.85)	(#4)	

SDEC APPT REQUEST (#409.85)	REQ SPECIFIC CLINIC (#8)	New
SDEC APPT REQUEST (#409.85)	REQ SERVICE/SPECIALTY (#8.5)	New
SDEC APPT REQUEST (#409.85)	ORIGINATING USER (#9)	New
SDEC APPT REQUEST (#409.85)	DATE/TIME ENTERED (#9.5)	New
SDEC APPT REQUEST (#409.85)	PRIORITY (#10)	New
SDEC APPT REQUEST (#409.85)	ENROLLMENT PRIORITY (#10.5)	New
SDEC APPT REQUEST (#409.85)	REQUESTED BY (#11)	New
SDEC APPT REQUEST (#409.85)	PROVIDER (#12)	New
SDEC APPT REQUEST (#409.85)	SCHEDULED DATE OF APPT (#13)	New
SDEC APPT REQUEST (#409.85)	DATE APPT. MADE (#13.1)	New
SDEC APPT REQUEST (#409.85)	APPT CLINIC (#13.2)	New
SDEC APPT REQUEST (#409.85)	APPT INSTITUTION (#13.3)	New
SDEC APPT REQUEST (#409.85)	APPT STOP CODE (#13.4)	New
SDEC APPT REQUEST (#409.85)	APPT CREDIT STOP CODE (#13.5)	New
SDEC APPT REQUEST (#409.85)	APPT STATION NUMBER (#13.6)	New
SDEC APPT REQUEST (#409.85)	APPT CLERK (#13.7)	New
SDEC APPT REQUEST (#409.85)	APPT STATUS (#13.8)	New
SDEC APPT REQUEST (#409.85)	SERVICE CONNECTED PERCENTAGE (#14)	New
SDEC APPT REQUEST (#409.85)	SERVICE CONNECTED PRIORITY (#15)	New
SDEC APPT REQUEST (#409.85)	DATE DISPOSITIONED (#19)	New
SDEC APPT REQUEST (#409.85)	DISPOSITIONED BY (#20)	New
SDEC APPT REQUEST (#409.85)	DISPOSITION (#21)	New
SDEC APPT REQUEST (#409.85)	CID/PREFERRED DATE OF APPT (#22)	New
SDEC APPT REQUEST (#409.85)	CURRENT STATUS (#23)	New
SDEC APPT REQUEST (#409.85)	COMMENTS (#25)	New
SDEC APPT REQUEST (#409.85)	MULTIPLE APPOINTMENT RTC (#41)	New
SDEC APPT REQUEST (#409.85)	MULT APPT RTC INTERVAL (#42)	New
SDEC APPT REQUEST (#409.85)	MULT APPT NUMBER (#43)	New
SDEC APPT REQUEST (#409.85)	MRTC CALC PREF DATES (#43.5)	New
SDEC APPT REQUEST (#409.85)	PATIENT CONTACT (#44)	New
Forms Associated:		
Form Name	File #	New/Modified/Deleted
-----	-----	-----
N/A		
Mail Groups Associated:		



Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
Hines: fo-hines.med.va.gov  
Salt Lake City: fo-slc.med.va.gov>

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library at: <http://www4.va.gov/vd1/>

File Description	File Name	FTP Mode
SCHEDULING User Manual	VSE_UG.PDF	(binary)
SCHEDULING Technical Manual	VSE_TM.PDF	(binary)
SCHEDULING Security Guide	VSE_SG.PDF	(binary)
SCHEDULING Install Guide	VSE_Install_Guide.PDF	(binary)

Patch Installation:

Pre/Post Installation Overview

- 
- There is not a Pre-Installation routine.  
The Post-Installation routine does the following functions:
1. Registers the new RPCs to the SDECRPC option.
  2. Checks the validity of existing cross-references that are used by Remote Procedures of VS GUI.  
No changes are made.
  3. Initializes new Mumps cross-references:
    - "AVADPR" in the HOSPITAL LOCATION file (#44)
    - "AG" in the HOSPITAL LOCATION file (#44)
    - "AC" in the SD WAIT LIST file (#409.3)
    - "AD" in the SD WAIT LIST file (#409.3)
    - "AE" in the SD WAIT LIST file (#409.3)
    - "E" in the SD WAIT LIST FILE (#409.3)
    - "AC" in the RECALL REMINDERS file (#403.5)
    - "AC" in the RECALL REMINDERS REMOVED file (#403.56)
  4. Populates the new SDEC RESOURCE file (#409.831) with clinics from the HOSPITAL LOCATION file (#44) as clinic resources, providers and privileged users as provider resources.
  5. Adds AVAILABLE and UNAVAILABLE entries to the new SDEC ACCESS TYPE file (#409.823).
  6. Populates the new SDEC APPOINTMENT file (#409.84) from existing patient appointments in the PATIENT file (#2).
  7. Schedules the SDEC IDX REFRESH option in TaskMan.

Pre-Installation Instructions

-----

Given that this patch takes some time to install, the following instructions are provided to assist OI&T personnel with its installation and output capture without having to tie up a computer screen. Just before selecting the device for the installation output, perform the following steps to queue the installation:

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

DEVICE: HOME// QUEUE TO PRINT ON  
DEVICE: HOME// P-MESSAGE

1 P-MESSAGE-ABC HFS FILE => MESSAGE

2 P-MESSAGE-HFS HFS FILE => MESSAGE

Choose 1-2> 2 P-MESSAGE-HFS HFS FILE => MESSAGE

Subject: PATCH SD\*5.3\*627 QUEUED INSTALL <=<= enter this Subject title

Select one of the following:

M	Me
P	Postmaster

From whom: Me//

Send mail to: DOEIRM,JOHN// <=<= Your name will echo here

Select basket to send to: IN//

And Send to:

Request Start Time: Jun 24, 2015@14:37:20// T@14:40 (JUN 24,  
2015@14:40:00)

Install Queued!

Note: once the installation has completed, you should have a Mailman message in your 'IN' box.

#### Installation Instructions

-----

This patch may not be installed with Scheduling Package users on the system and it is recommended that it be installed during non-peak hours. The installation time will vary from site to site depending on the size of their database.

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following option. When prompted for the INSTALL enter the patch # (SD\*5.3\*627):
  - a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DD's or templates.
  - b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DD's, templates, etc.).
  - c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.
4. From the Installation Menu, select the Install Package(s) option and choose the patch to install. Enter SD\*5.3\*627.
5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', respond YES.
6. When prompted 'ENTER the date and time to start the schedule of the SDEC IDX REFRESH nightly job:' respond with <ENTER> to accept the default.
7. When prompted 'Do you want to schedule the SEC IDX REFRESH option to run now?', respond YES.
8. When prompted 'Want KIDS to INHIBIT LOGONS during the install? NO//', respond NO.

9. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', respond YES.

Options to mark as out of order:

Scheduling Manager's Menu	[SDMGR]
Supervisor Menu	[SDSUP]
Scheduling Menu	[SDUSER]
Set up a Clinic	[SDBUILD]

10. If prompted 'Delay Install (Minutes): (0 - 60): 0//', respond 0.

#### Post-Installation Instructions

After the installation is complete:

1. Users that need access to the VistA Scheduling client will need to be assigned the appropriate Security Keys - SDECZMENU and/or SDECZMGR. See the SCHEDULING Install Guide for details.
2. Users that need access to the VistA Scheduling client will need the SDECRCPC option defined as a secondary menu option. See the SCHEDULING Install Guide for details.
3. In order for the Resource Management Report to work correctly please ensure that patch SD\*5.3\*628 is installed following each installation of SD\*5.3\*627.

#### Routine Information:

=====

The second line of each of these routines now looks like:

```
;;5.3;Scheduling;*[Patch List]*;Aug 13, 1993;Build 249
```

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: SDAM2	Before: B28969353	After: B30803018	**250,296,327,478,446,627**
Routine Name: SDAMWI1	Before: B10737470	After: B14489968	**94,167,206,168,544,627**
Routine Name: SDAPIAP	Before: B8835503	After: B10732233	**27,132,627**
Routine Name: SDAUT2	Before: B31407723	After: B42702600	**206,168,186,478,627**
Routine Name: SDB	Before: B18180788	After: B18505043	**20,63,167,455,568,586,627**
Routine Name: SDB1	Before: B23427765	After: B24033507	**20,183,221,567,627**
Routine Name: SDC	Before: B27191984	After: B27637649	**15,32,79,132,167,478,487,523,545,627**
Routine Name: SDCNP0	Before: B37888084	After: B40198602	**132,167,478,517,572,592,627**
Routine Name: SDCNSLT	Before: B40912591	After: B41631358	**478,496,630,627**
Routine Name: SDC01	Before: B29919726	After: B32537404	**27,132,149,193,250,296,446,538,627**
Routine Name: SDCODEL	Before: B9522371	After: B11313917	**20,27,44,97,105,110,132,257,627**
Routine Name: SDEC	Before: n/a	After: B119334331	**627**
Routine Name: SDEC01	Before: n/a	After: B31785408	**627**
Routine Name: SDEC01A	Before: n/a	After: B81925987	**627**
Routine Name: SDEC01B	Before: n/a	After: B44978361	**627**
Routine Name: SDEC02			

Before:	n/a	After:	B32953550	**627**
Routine Name:	SDEC03			
Before:	n/a	After:	B10323049	**627**
Routine Name:	SDEC04			
Before:	n/a	After:	B18857087	**627**
Routine Name:	SDEC05			
Before:	n/a	After:	B17215588	**627**
Routine Name:	SDEC06			
Before:	n/a	After:	B7162903	**627**
Routine Name:	SDEC07			
Before:	n/a	After:	B222963350	**627**
Routine Name:	SDEC07A			
Before:	n/a	After:	B68824292	**627**
Routine Name:	SDEC07B			
Before:	n/a	After:	B38090532	**627**
Routine Name:	SDEC08			
Before:	n/a	After:	B196754600	**627**
Routine Name:	SDEC09			
Before:	n/a	After:	B40258209	**627**
Routine Name:	SDEC12			
Before:	n/a	After:	B29844447	**627**
Routine Name:	SDEC13			
Before:	n/a	After:	B12841797	**627**
Routine Name:	SDEC14			
Before:	n/a	After:	B7453405	**627**
Routine Name:	SDEC15			
Before:	n/a	After:	B4187047	**627**
Routine Name:	SDEC16			
Before:	n/a	After:	B47386290	**627**
Routine Name:	SDEC17			
Before:	n/a	After:	B1597668	**627**
Routine Name:	SDEC18			
Before:	n/a	After:	B103998587	**627**
Routine Name:	SDEC19			
Before:	n/a	After:	B8445487	**627**
Routine Name:	SDEC20			
Before:	n/a	After:	B5301458	**627**
Routine Name:	SDEC21			
Before:	n/a	After:	B7740640	**627**
Routine Name:	SDEC22			
Before:	n/a	After:	B7903904	**627**
Routine Name:	SDEC23			
Before:	n/a	After:	B8880360	**627**
Routine Name:	SDEC24			
Before:	n/a	After:	B8031928	**627**
Routine Name:	SDEC25			
Before:	n/a	After:	B107893271	**627**
Routine Name:	SDEC25A			
Before:	n/a	After:	B6651279	**627**
Routine Name:	SDEC25B			
Before:	n/a	After:	B10232111	**627**
Routine Name:	SDEC26			
Before:	n/a	After:	B6836926	**627**
Routine Name:	SDEC27			
Before:	n/a	After:	B106344952	**627**
Routine Name:	SDEC28			
Before:	n/a	After:	B71646964	**627**
Routine Name:	SDEC29			
Before:	n/a	After:	B31682392	**627**
Routine Name:	SDEC30			
Before:	n/a	After:	B3786070	**627**
Routine Name:	SDEC31			
Before:	n/a	After:	B25481973	**627**
Routine Name:	SDEC32			
Before:	n/a	After:	B69352136	**627**
Routine Name:	SDEC33			
Before:	n/a	After:	B10928495	**627**
Routine Name:	SDEC34			
Before:	n/a	After:	B41388078	**627**

Routine Name: SDEC35	Before: n/a	After: B8873158	**627**
Routine Name: SDEC36	Before: n/a	After: B3226334	**627**
Routine Name: SDEC37	Before: n/a	After: B7567190	**627**
Routine Name: SDEC38	Before: n/a	After: B35171696	**627**
Routine Name: SDEC40	Before: n/a	After: B66764561	**627**
Routine Name: SDEC44	Before: n/a	After: B8409964	**627**
Routine Name: SDEC45	Before: n/a	After: B118776780	**627**
Routine Name: SDEC46	Before: n/a	After: B11804599	**627**
Routine Name: SDEC47	Before: n/a	After: B35928564	**627**
Routine Name: SDEC48	Before: n/a	After: B25736375	**627**
Routine Name: SDEC49	Before: n/a	After: B57319976	**627**
Routine Name: SDEC50	Before: n/a	After: B81989355	**627**
Routine Name: SDEC51	Before: n/a	After: B124307281	**627**
Routine Name: SDEC52	Before: n/a	After: B134090636	**627**
Routine Name: SDEC52A	Before: n/a	After: B49259718	**627**
Routine Name: SDEC52B	Before: n/a	After: B20509023	**627**
Routine Name: SDEC53	Before: n/a	After: B19046849	**627**
Routine Name: SDEC54	Before: n/a	After: B197526561	**627**
Routine Name: SDEC54A	Before: n/a	After: B18379020	**627**
Routine Name: SDEC55	Before: n/a	After: B16588920	**627**
Routine Name: SDEC55A	Before: n/a	After: B79593054	**627**
Routine Name: SDEC56	Before: n/a	After: B35889062	**627**
Routine Name: SDEC57	Before: n/a	After: B39358442	**627**
Routine Name: SDEC57A	Before: n/a	After: B103325420	**627**
Routine Name: SDECALV	Before: n/a	After: B21735458	**627**
Routine Name: SDECALV1	Before: n/a	After: B23447725	**627**
Routine Name: SDECALVR	Before: n/a	After: B5946964	**627**
Routine Name: SDECAPI	Before: n/a	After: B60453354	**627**
Routine Name: SDECAPI4	Before: n/a	After: B83504203	**627**
Routine Name: SDECAR	Before: n/a	After: B56209815	**627**
Routine Name: SDECAR1	Before: n/a	After: B118549716	**627**
Routine Name: SDECAR2	Before: n/a	After: B118404786	**627**
Routine Name: SDECDEV	Before: n/a	After: B4544261	**627**
Routine Name: SDECIDIQ1	Before: n/a	After: B23533098	**627**
Routine Name: SDECDIS			

Before:	n/a	After:	B9266353	**627**
Routine Name:	SDECEKL			
Before:	n/a	After:	B3200595	**627**
Routine Name:	SDECERR			
Before:	n/a	After:	B718946	**627**
Routine Name:	SDECF			
Before:	n/a	After:	B5042632	**627**
Routine Name:	SDECF2			
Before:	n/a	After:	B1878114	**627**
Routine Name:	SDECFUNC			
Before:	n/a	After:	B8710927	**627**
Routine Name:	SDECGMR			
Before:	n/a	After:	B946861	**627**
Routine Name:	SDECIDX			
Before:	n/a	After:	B43106825	**627**
Routine Name:	SDECINI1			
Before:	n/a	After:	B187190488	**627**
Routine Name:	SDECINI2			
Before:	n/a	After:	B137379509	**627**
Routine Name:	SDECINIT			
Before:	n/a	After:	B30544543	**627**
Routine Name:	SDECLK			
Before:	n/a	After:	B9204662	**627**
Routine Name:	SDECLOC			
Before:	n/a	After:	B4435373	**627**
Routine Name:	SDECNEW			
Before:	n/a	After:	B4856106	**627**
Routine Name:	SDECPAT			
Before:	n/a	After:	B3637810	**627**
Routine Name:	SDECPAT1			
Before:	n/a	After:	B1134752	**627**
Routine Name:	SDECPAT2			
Before:	n/a	After:	B255586	**627**
Routine Name:	SDECPAT3			
Before:	n/a	After:	B6176667	**627**
Routine Name:	SDECPAT4			
Before:	n/a	After:	B9974559	**627**
Routine Name:	SDECPT			
Before:	n/a	After:	B2478759	**627**
Routine Name:	SDECPTCX			
Before:	n/a	After:	B4715537	**627**
Routine Name:	SDECPTPC			
Before:	n/a	After:	B160453	**627**
Routine Name:	SDECPTPL			
Before:	n/a	After:	B13347416	**627**
Routine Name:	SDECRMG			
Before:	n/a	After:	B157648695	**627**
Routine Name:	SDECRMG1			
Before:	n/a	After:	B130816452	**627**
Routine Name:	SDECRMG2			
Before:	n/a	After:	B65998765	**627**
Routine Name:	SDECRPC			
Before:	n/a	After:	B6073216	**627**
Routine Name:	SDECRT			
Before:	n/a	After:	B5803317	**627**
Routine Name:	SDECRT0			
Before:	n/a	After:	B18723369	**627**
Routine Name:	SDECRT1			
Before:	n/a	After:	B72713204	**627**
Routine Name:	SDECRT2			
Before:	n/a	After:	B4377091	**627**
Routine Name:	SDECSFGR			
Before:	n/a	After:	B2111835	**627**
Routine Name:	SDECU			
Before:	n/a	After:	B22991058	**627**
Routine Name:	SDECU2			
Before:	n/a	After:	B28139017	**627**
Routine Name:	SDECUT1A			
Before:	n/a	After:	B65268393	**627**

Routine Name: SDECUTL	Before: n/a	After: B57837892	**627**
Routine Name: SDECUTL1	Before: n/a	After: B111920247	**627**
Routine Name: SDECUTL2	Before: n/a	After: B135475615	**627**
Routine Name: SDECV	Before: n/a	After: B107508145	**627**
Routine Name: SDECWL	Before: n/a	After: B53903000	**627**
Routine Name: SDECWL1	Before: n/a	After: B116385737	**627**
Routine Name: SDECWL2	Before: n/a	After: B102907164	**627**
Routine Name: SDECWL3	Before: n/a	After: B12297706	**627**
Routine Name: SDM1A	Before: B78000980	After: B121204157	**26, 94, 155, 206, 168, 223, 241, 263, 327, 478, 446, 544, 621, 622, 627**
Routine Name: SDN	Before: B30846315	After: B32745405	**32, 79, 398, 478, 627**
Routine Name: SDNACT	Before: B29097285	After: B32382178	**63, 380, 549, 568, 622, 627**
Routine Name: SDREACT	Before: B20261844	After: B21351976	**63, 167, 380, 568, 627**
Routine Name: SDRRISRU	Before: B13362967	After: B14287203	**536, 627**
Routine Name: SDWLPL	Before: B39152733	After: B39936287	**327, 394, 417, 446, 538, 627**

Routine list of preceding patches: 257, 536, 538, 545, 567, 586, 592, 622  
630

## 5.2. SD\*5.3\*628

```
Vista Patch Display Page: 1
=====
Run Date: APR 17, 2016      Designation: SD*5.3*628
Package : SCHEDULING       Priority   : MANDATORY
Version : 5.3              Status    : COMPLETE/NOT RELEASED
=====
```

Associated patches: (c)SD\*5.3\*627 <=< must be installed BEFORE `SD\*5.3\*628`

Subject: VISTA SCHEDULING ENHANCEMENT 3 (VSE)

Category: ROUTINE  
          ENHANCEMENT

Description:  
=====

This patch contains server side functionality for the Vista Scheduling Enhancements (VSE) Enhancements 3 (E3) project. The VSE E3 project implements a GUI reporting application designed to run on user workstations, and launches via a button in the Reports tab in the VSE Enhancement 1 (E1) Vista Scheduling GUI application.

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.

The report is not available from any legacy Vista option.

The only functionality available within legacy Vista is an option to queue the data extraction and compilation process via Vista option Vista Scheduling GUI Resource Mgmt Report Data Compile [SDEC REPORT DATA]. This option has also been added to the Option Scheduling (#19.2) file to run once a day at 3 A.M. as a regularly scheduled background task. The compiled data is stored in the ^XTMP("SDVSE") and ^XTMP("SDCEX") globals for a full year's worth of report data when the scheduled option runs the first time. Each subsequent run will only collect appointment related metrics data for the past 90 days.

After the SDEC REPORT DATA background job completes, a MailMan message will be sent to the user that scheduled the option or that installed the patch. This MailMan message can be turned off by changing the ENTRY ACTION for the option through FileMan. By default, the ENTRY ACTION sets the variable SDECMAIL=1. To turn the MailMan message functionality off, either delete the ENTRY ACTION field entirely, or set the SDECMAIL variable to zero.

```
NAME: SDEC REPORT DATA
MENU TEXT: Vista Scheduling GUI Resource Mgmt Report Data
TYPE: run routine      CREATOR: TOMLIN,BRIAN
PACKAGE: SCHEDULING    E ACTION PRESENT: YES
X ACTION PRESENT: YES
DESCRIPTION: This option allows Scheduling Administrators to initiate
the Vista Scheduling GUI Resource Management Report data compilation.
EXIT ACTION: D EXITOPT^SDCED      ENTRY ACTION: S SDECMAIL=1
ROUTINE: QUEUE^SDCED             TIMESTAMP: 63516,28327
SCHEDULING RECOMMENDED: YES
UPPERCASE MENU TEXT: VISTA SCHEDULING GUI RESOURCE
```

This patch adds a New Style cross-reference on the OUTPATIENT ENCOUNTERS file (#409.68). The 'D' index is created as a compound index on the DATE field (.01) and the CHECK OUT PROCESS COMPLETION field (.07). The 'D' index is only used by the Vista Scheduling GUI Resource Management Report to identify potential Provider Outpatient Encounters to include in the report metrics.

Vista Remote Procedure Call (RPC) SD VSE FILTER RPC is available for the Vista Scheduling GUI application to return the list of Report Types (Mental Health, Primary Care, Specialty Care), the list of available date aggregates (Year, Quarter, Month, Week, Date), and the date range corresponding to the selected date aggregate. The values returned by SD VSE FILTER RPC are used to populate the corresponding E3 report filters.

Vista Remote Procedure Call (RPC) SD VSE REPORT RPC returns the report data corresponding to the values selected by the initial three filters (Report Type, Date Aggregate, Date Range).

Patch Components  
 =====

Files & Fields Associated:

File Name (#)	Field Name (#)	New/Modified/Deleted
OUTPATIENT ENCOUNTER (409.68)	DATE (.01)	Modified with New Index
	CHECK OUT PROCESS COMPLETION (.07)	Modified with New Index

Forms Associated:

Form Name	File #	New/Modified/Deleted
N/A		

Functions Associated:

Function Name	New/Modified/Deleted
N/A	

HL Logical Link:

HL Logical Name	New/Modified/Deleted
N/A	

HL7 Application Parameters:

HL7 Parameter Name	New/Modified/Deleted
N/A	

HLO Application Registry:

HLO Registry Name	New/Modified/Deleted
N/A	

Mail Groups Associated:

Mail Group Name	New/Modified/Deleted
N/A	

Options Associated:

Option Name	Type	New/Modified/Deleted
-------------	------	----------------------

SDEC REPORT DATA	run routine	New	
SDMGR	menu	Modified	
Parameter Definitions:			
Parameter Name		New/Modified/Deleted	
SDEC MENTAL HEALTH STOP CODES		New	
SDEC PRIMARY CARE STOP CODES		New	
SDEC SPECIALTY CARE STOP CODES		New	
Protocols Associated:			
Protocol Name		New/Modified/Deleted	
N/A			
Remote Procedure Calls:			
RPC Name		New/Modified/Deleted	
SD VSE FILTER RPC		New	
SD VSE REPORT RPC		New	
Security Keys Associated:			
Security Key Name			
N/A			
Templates Associated:			
Template Name	Type	File Name (#)	New/Modified/Deleted
N/A			
Additional Information:			
N/A			
New Service Requests (NSRs):			
N/A			
Patient Safety Issues (PSIs):			
N/A			
Remedy Ticket(s) & Overviews:			
N/A			
Test Sites:			
Asheville			
Hudson Valley			
Salt Lake City			
Chillicothe			
Software and Documentation Retrieval Instructions:			
Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.			
The preferred method is to retrieve files from <a href="http://download.vista.med.va.gov">download.vista.med.va.gov</a> .			

This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
Hines: fo-hines.med.va.gov  
Salt Lake City: fo-slc.med.va.gov>

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library at: <http://www4.va.gov/vdl/>

File Description	File Name	FTP Mode
SCHEDULING Technical Manual	VSE_TM.PDF	(binary)

Patch Installation:

Pre/Post Installation Overview

The Post Install routine will add new Parameters that are associated with pre-determined Stop Codes. These Stop Codes are used to identify clinics to be included in the VistA Scheduling GUI Resource Management Reports for clinic metrics. The categories for these stop codes will be related to Primary Care, Specialty Care and Mental Health clinics only.

The Post Install routine will queue a background job to re-index the OUTPATIENT ENCOUNTER file (#409.68) in order to create the new 'D' cross-reference used to identify Provider Encounters used in the VSE GUI Resource Management Reports.

The Post Install routine will also schedule the SDEC REPORT DATA option to run at 3:00 AM every morning. The last thing the Post Install routine will do is trigger the background process to collect the VistA Scheduling appointment data to be used by the VistA Scheduling GUI Resource Management Reporting tool.

Pre-Installation Instructions

This patch may be installed with users on the system although it is recommended that it be installed during non-peak hours to minimize potential disruption to users. This patch should take less than 5 minutes to install.

Installation Instructions

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following option. When prompted for the INSTALL enter the patch # (SD\*5.3\*628):
  - a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DD's or templates.
  - b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch

(routines, DD's, templates, etc.).

c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.

4. From the Installation Menu, select the Install Package(s) option and choose the patch to install. Enter SD\*5.3\*628.
5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', respond NO.
6. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//', respond NO.
7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', respond NO.
8. If prompted 'Delay Install (Minutes): (0 - 60): 0//', respond 0.

Post-Installation Instructions

-----

N/A

Routine Information:

=====

The second line of each of these routines now looks like:  
;;5.3;Scheduling;\*[Patch List]\*;Aug 13, 1993;Build 371

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

```

Routine Name: SD628PST
  Before:      n/a   After: B50060258  **628**
Routine Name: SDCED
  Before:      n/a   After: B153388689 **628**
Routine Name: SDCED1
  Before:      n/a   After: B153290319 **628**
Routine Name: SDCED2
  Before:      n/a   After: B72509426  **628**
Routine Name: SDECRPT
  Before:      n/a   After: B10301780  **628**
Routine Name: SDECSTP
  Before:      n/a   After: B58569948  **628**
Routine Name: SDECXML
  Before:      n/a   After: B121803076 **628**
Routine Name: SDECXML1
  Before:      n/a   After: B60170099  **628**
Routine Name: SDECXML2
  Before:      n/a   After: B67559212  **628**
Routine Name: SDECXML3
  Before:      n/a   After: B81460812  **628**
Routine Name: SDECXML4
  Before:      n/a   After: B104004316 **628**
Routine Name: SDECXML5
  Before:      n/a   After: B102847161 **628**
Routine Name: SDECXUTL
  Before:      n/a   After: B79794674  **628**

```

### 5.3. SD\*5.3\*642

```

=====
Run Date: APR 17, 2016           Designation: SD*5.3*642
Package : SCHEDULING           Priority   : MANDATORY
Version : 5.3                   Status    : COMPLETE/NOT RELEASED
=====

```

Associated patches: (v)SD\*5.3\*536 <=< must be installed BEFORE `SD\*5.3\*642'  
(c)SD\*5.3\*643 <=< must be installed BEFORE `SD\*5.3\*642'

Subject: Vista Scheduling Enhancement Release 2

Category: ENHANCEMENT  
ROUTINE  
DATA DICTIONARY  
OTHER

Description:  
=====

The Veterans Health Administration (VHA) Access and Clinic Administrative Program (ACAP) has requested an enterprise enhancement for the Vista Scheduling Package. The enhancement will reduce operating cost for VHA and improve operational efficiencies resulting in patient centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time used for scheduling patients.

This patch contains phase 2 of the server API support for the Vista Scheduling Client as follows:

- \*\* For inpatients, the VS GUI shall display ward location in patient demographic area for each patient. To support this change, ward location has been included in the Remote Procedure Call (RPC) 'SDEC GETREGA'.
- \*\* The VS GUI shall display special clinic instructions on the screen. The data from the SPECIAL INSTRUCTIONS multiple field (#1910) in the HOSPITAL LOCATION file (#44) is now returned in the RPC 'SDEC CLINSET' to support this change.
- \*\* Add Cancel to the SDEC ACCESS TYPE file (#409.823) and use that access type in the return for the RPC 'SDEC CSLOTSCH' when the availability has been cancelled.
- \*\* Do not return clinics in RPCs when the OCCASION OF SERVICE CLINIC? field in the HOSPITAL LOCATION file (#44) is defined as 'YES'.
- \*\* Add new RPC called 'SDEC APPSLOTS' to return availability string from Vista.
- \*\* Add W2VA - WELCOME TO VA to the Set of codes in the REQUEST TYPE field (#4) of the SDEC APPT REQUEST file (#409.85).
- \*\* Add the RPC 'SDEC NOAVAIL' to determine if availability has ever been defined for a given clinic.
- \*\* Add the multiple field VS AUDIT to the SD WAIT LIST file (#409.3) and SDEC APPT REQUEST file (#409.85). The RPCs 'SDEC WLSET' and 'SDEC ARSET' have been enhanced to support adds and updates to these new multiples. The RPCs 'SDECAR AUDITGET' and 'SDECWL AUDITGET' have been added to retrieve the data from these new multiples.
- \*\* OT4 Release 2 - Comp & Pension Appointments. Support for AMIE scheduling event driver.
- \*\* Updates to the RPCs 'SDEC APPADD', 'SDEC ARMRTSET', 'SDEC ARSET', and 'SDEC ARGET' have been implemented to support the PARENT/CHILD relationships between entries in the SDEC APPT REQUEST file (#409.85).
- \*\* Add the RPC 'SDECAPP GETYPE' to get the APPOINTMENT TYPE for the given SDEC APPOINTMENT id.
- \*\* Change the COMMENT field of the SDEC APPT REQUEST file (#409.85) to accept 80 characters instead of 60.

\*\* Single Sign-on support for CALL CENTER.

\*\* Updates to SSN formatted inputs in the RPC 'SDEC PTLOOKRS'.

Patch Components

=====

Files & Fields Associated:

File Name (#)	Field Name (#)	NEW/MODIFIED/DELETED
SD WAIT LIST (#409.3)	VS AUDIT (#45)	New
VS AUDIT sub-file (409.345)	DATE EDITED (#.01)	New
VS AUDIT sub-file (409.345)	EDITED BY (#1)	New
VS AUDIT sub-file (409.345)	WL SPECIFIC CLINIC (#2)	New
VS AUDIT sub-file (409.345)	WL SPECIFIC HOSPITAL LOCATION (#3)	New
VS AUDIT sub-file (409.345)	WL SERVICE/SPECIALTY (#4)	New
SDEC APPT REQUEST (#409.85)	REQUEST TYPE (#4)	Modified
MULT APPTS MADE sub-file (409.852)	PARENT REQUEST (#.02)	New
SDEC APPT REQUEST (409.85)	VS AUDIT (#45)	New
VS AUDIT sub-file (409.8545)	DATE EDITED (#.01)	New
VS AUDIT sub-file (409.8545)	EDITED BY (#1)	New
VS AUDIT sub-file (409.8545)	REQ SPECIFIC CLINIC (#2)	New
VS AUDIT sub-file (409.8545)	REQ SERVICE/SPECIALTY (#3)	New

Forms Associated:

Form Name	File #	New/Modified/Deleted
N/A		

Mail Groups Associated:

Mail Group Name	New/Modified/Deleted
N/A	

Options Associated:

Option Name	Type	New/Modified/Deleted
N/A		

Protocols Associated:

Protocol Name	New/Modified/Deleted
N/A	

Security Keys Associated:

Security Key Name

N/A

Templates Associated:

Template Name	Type	File Name (#)	New/Modified/Deleted
---------------	------	---------------	----------------------

N/A

Additional Information: N/A

New Service Requests (NSRs):

N/A

Patient Safety Issues (PSIs):

N/A

Remedy Ticket(s) & Overviews:

N/A

Test Sites:

Asheville  
Hudson Valley  
Salt Lake City  
Chillicothe

Software and Documentation Retrieval Instructions:

Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.

The preferred method is to retrieve files from [download.vista.med.va.gov](http://download.vista.med.va.gov). This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
Hines: fo-hines.med.va.gov  
Salt Lake City: fo-slc.med.va.gov

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library at: <http://www4.va.gov/vdl/>

File Description	File Name	FTP Mode
SCHEDULING Technical Manual	VSE_TM.PDF	(binary)

Patch Installation:

Pre/Post Installation Overview

- The Post-Installation routine does the following functions:
1. Registers the new RPCs to the SDECRPC option
  2. Adds CANCELLED entry to the new SDEC ACCESS TYPE
  3. Initializes new Mumps cross-references:

- "AC" in the SDEC RESOURCE file (#409.831)
  - "AC" in the SDEC APPOINTMENT file (#409.84)
4. Add/update entry in the REMOTE APPLICATION file (#8994.5) for VS SCHEDULING CALL CENTER

Pre-Installation Instructions

-----  
N/A

Installation Instructions

-----  
This patch may not be installed with Scheduling Package users on the system and it is recommended that it be installed during non-peak hours. The installation time will vary from site to site depending on the size of their database.

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following option. When prompted for the INSTALL enter the patch # (SD\*5.3\*642):
  - a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DD's or templates.
  - b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DD's, templates, etc.).
  - c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.
4. From the Installation Menu, select the Install Package(s) option and choose the patch to install. Enter SD\*5.3\*642.
5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', respond NO.
6. When prompted 'Want KIDS to INHIBIT LOGONS during the install? NO//', respond NO.
7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', respond NO.
10. If prompted 'Delay Install (Minutes): (0 - 60): 0//', respond 0.

Post-Installation Instructions

-----  
N/A

Routine Information:

=====

The second line of each of these routines now looks like:  
;;5.3;Scheduling;\*[Patch List]\*;Aug 13, 1993;Build 23

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: SDEC

Before:	n/a	After:	B123628700	**627,643,642**
Routine Name:	SDEC01			
Before:	n/a	After:	B31336971	**627,642**
Routine Name:	SDEC01A			
Before:	n/a	After:	B82347339	**627,642**
Routine Name:	SDEC01B			
Before:	n/a	After:	B45005907	**627,642**
Routine Name:	SDEC02			
Before:	n/a	After:	B53092916	**627,642**
Routine Name:	SDEC03			
Before:	n/a	After:	B12348833	**627,642**
Routine Name:	SDEC04			
Before:	n/a	After:	B23906139	**627,642**
Routine Name:	SDEC07			
Before:	n/a	After:	B225769196	**627,642**
Routine Name:	SDEC07A			
Before:	n/a	After:	B75289640	**627,642**
Routine Name:	SDEC09			
Before:	n/a	After:	B41566743	**627,642**
Routine Name:	SDEC20			
Before:	n/a	After:	B5301458	**627,642**
Routine Name:	SDEC28			
Before:	n/a	After:	B70851375	**627,642**
Routine Name:	SDEC32			
Before:	n/a	After:	B72731252	**627,643,642**
Routine Name:	SDEC45			
Before:	n/a	After:	B118776780	**627,642**
Routine Name:	SDEC51			
Before:	n/a	After:	B122637073	**627,642**
Routine Name:	SDEC52			
Before:	n/a	After:	B135366085	**627,642**
Routine Name:	SDEC54			
Before:	n/a	After:	B183258536	**627,642**
Routine Name:	SDEC54A			
Before:	n/a	After:	B75446000	**627,642**
Routine Name:	SDEC56			
Before:	n/a	After:	B36315965	**627,642**
Routine Name:	SDEC57			
Before:	n/a	After:	B37410501	**627,642**
Routine Name:	SDEC57A			
Before:	n/a	After:	B104060307	**627,643,642**
Routine Name:	SDEC58			
Before:	n/a	After:	B37465349	**627,642**
Routine Name:	SDEC59			
Before:	n/a	After:	B3551986	**642**
Routine Name:	SDECAPP			
Before:	n/a	After:	B953058	**642**
Routine Name:	SDECAR			
Before:	n/a	After:	B92353393	**627,642**
Routine Name:	SDECAR1			
Before:	n/a	After:	B139681352	**627,642**
Routine Name:	SDECAR2			
Before:	n/a	After:	B157125320	**627,642**
Routine Name:	SDECCAP			
Before:	n/a	After:	B108308383	**642**
Routine Name:	SDECI2			
Before:	n/a	After:	B69090314	**642**
Routine Name:	SDECIDX			
Before:	n/a	After:	B43106825	**627,642**
Routine Name:	SDECRMG1			
Before:	n/a	After:	B133141523	**627,642**
Routine Name:	SDECRMG2			
Before:	n/a	After:	B65998765	**627,642**
Routine Name:	SDECUTL1			
Before:	n/a	After:	B116466416	**627,642**
Routine Name:	SDECUTL2			
Before:	n/a	After:	B137868576	**627,642**
Routine Name:	SDECWL			
Before:	n/a	After:	B69248242	**627,642**

```

Routine Name: SDECWL1
  Before:      n/a      After: B117400497  **627,642**
Routine Name: SDECWL2
  Before:      n/a      After: B124990360  **627,642**
Routine Name: SDRRCLR
  Before:      B6432300 After: B15280543  **536,642**

```

Routine list of preceding patches: 536, 643

## 5.4. SD\*5.3\*643

```

=====
Run Date: APR 17, 2016      Designation: SD*5.3*643
Package : SCHEDULING       Priority   : MANDATORY
Version : 5.3              Status    : COMPLETE/NOT RELEASED
=====

```

```

Associated patches: (v)SD*5.3*579 <=< must be installed BEFORE `SD*5.3*643'
                  (v)SD*5.3*582 <=< must be installed BEFORE `SD*5.3*643'
                  (c)SD*5.3*627 <=< must be installed BEFORE `SD*5.3*643'

```

Subject: Vista Scheduling Enhancement Release 3

```

Category: ENHANCEMENT
          ROUTINE
          DATA DICTIONARY
          INPUT TEMPLATE

```

Description:  
=====

The Veterans Health Administration (VHA) Access and Clinic Administrative Program (ACAP) has requested an enterprise enhancement for the Vista Scheduling Package. The enhancement will reduce operating cost for VHA and improve operational efficiencies resulting in patient centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time used for scheduling patients.

This patch contains phase 3 of the server API support for the Vista Scheduling Client as follows:

- \*\* Change Recall Reminder Parameter Setting from 365 days to 45 days or less. This has been approved by the VA DBA.
- \*\* Recall Dates need to be protected and a Recall should not be added if there is not a Recall Letter defined for the Clinic in the RECALL REMINDERS LETTERS file (#403.52).
- \*\* Add the new option Clinic Letter Report [SDRR CLINIC LETTER REPORT] to display a report of RECALL REMINDER entries in which the associated clinic does not have a RECALL REMINDERS LETTERS defined.
- \*\* Continue printing Recall Letters which did not complete printing after an abrupt system shut down. The SDRR TASK JOB option has been updated to allow letters prior to the calculated date to be printed if the DATE REMINDER SENT field in the RECALL REMINDERS entry has not been populated.
- \*\* Add stop code/credit stop combination search criteria of the Recall Clinic.

Patch Components  
=====

Files & Fields Associated:

File Name (#)	Field Name (#)	NEW/MODIFIED/DELETED
RECALL REMINDERS (#403.5)	RECALL DATE (#5)	Modified
RECALL REMINDERS (#403.5)	RECALL DATE (PER PATIENT) (#5.5)	Modified
RECALL REMINDERS (#403.5)	DATE/TIME RECALL ADDED (#7.5)	Modified
RECALL REMINDERS PARAMETER (#403.53)	CLEAN UP DAY SETTING (#4)	Modified

Forms Associated:

Form Name	File #	New/Modified/Deleted
N/A		

Mail Groups Associated:

Mail Group Name	New/Modified/Deleted
N/A	

Options Associated:

Option Name	Type	New/Modified/Deleted
N/A		

Protocols Associated:

Protocol Name	New/Modified/Deleted
N/A	

Security Keys Associated:

Security Key Name
N/A

Templates Associated:

Template Name	Type	File Name (#)	New/Modified/Deleted
SDRR RECALL CARD ADD	INPUT	RECALL REMINDERS (403.5)	Modified

Additional Information: N/A

New Service Requests (NSRs):

N/A

Patient Safety Issues (PSIs):

N/A

Remedy Ticket(s) & Overviews:

N/A

Test Sites:

Asheville

Hudson Valley  
Salt Lake City  
Chillicothe

Software and Documentation Retrieval Instructions:

Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.

The preferred method is to retrieve files from [download.vista.med.va.gov](http://download.vista.med.va.gov). This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
Hines: fo-hines.med.va.gov  
Salt Lake City: fo-slc.med.va.gov

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library at: <http://www4.va.gov/vdl/>

File Description	File Name	FTP Mode
RECALL REMINDER User Guide	SD_53_536_UG.PDF	(binary)
RECAL REMINDER T&S GUIDE	SD_53_574_TSG.PDF	(binary)

Patch Installation:

Pre/Post Installation Overview

- The Post-Installation routine does the following functions:
1. Registers the new RPCs to the SDEC RPC option
  2. Updates the CLEAN UP DAY SETTING field for all entries of the RECALL REMINDERS PARAMETERS file (#403.53) with the responses from the previous question(s).

Pre-Installation Instructions

1. For all entries in the RECALL REMINDERS PARAMETERS file (#403.53), the CLEAN UP DAY SETTING field 4 should be defined to be 45 days or less.

Installation Instructions

This patch may not be installed with Scheduling Package users on the system and it is recommended that it be installed during non-peak hours. The installation time will vary from site to site depending on the size of their database.

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. If prompted 'ENTER the number of days for the CLEAN UP DAY SETTING field for DIVISION xxxxx', respond with a number between 0-45.
4. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the

following option. When prompted for the INSTALL enter the patch # (SD\*5.3\*643):

- a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DD's or templates.
- b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DD's, templates, etc.).
- c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.

- 4. From the Installation Menu, select the Install Package(s) option and choose the patch to install. Enter SD\*5.3\*643.
- 5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//', respond NO.
- 6. When prompted 'Want KIDS to INHIBIT LOGONS during the install? NO//', respond NO.
- 7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', respond NO.
- 10. If prompted 'Delay Install (Minutes): (0 - 60): 0//', respond 0.

#### Post-Installation Instructions

-----  
The scheduled options SDRR TASK JOB and SDRR TASK JOB CARD should be defined as Persistent so that they will be started when TaskMan restarts.

#### Routine Information: =====

The second line of each of these routines now looks like:  
;;5.3;Scheduling;\*[Patch List]\*;Aug 13, 1993;Build 14

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: SDEC	Before: n/a	After: B119470269	**627,643**
Routine Name: SDEC32	Before: n/a	After: B71447316	**627,643**
Routine Name: SDEC46	Before: n/a	After: B13193597	**627,643**
Routine Name: SDEC57A	Before: n/a	After: B107425052	**627,643**
Routine Name: SDECI3E	Before: n/a	After: B7698330	**643**
Routine Name: SDRRREP	Before: n/a	After: B9249872	**643**
Routine Name: SDRRTSK	Before: B16436609	After: B16926080	**536,579,643**
Routine Name: SDRRTSK1	Before: B9538954	After: B9951175	**536,579,643**
Routine Name: SDRRUTL	Before: B59389500	After: B62204339	**536,571,582,643**

Routine list of preceding patches: 579, 582, 627

## 5.5. SD\*5.3\*645

```

=====
Run Date: APR 17, 2016                Designation: SD*5.3*645
Package : SCHEDULING                 Priority  : MANDATORY
Version : 5.3                        Status   : COMPLETE/NOT RELEASED
=====

```

```

Associated patches: (v)SD*5.3*241 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*263 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*291 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*394 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*412 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*414 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*419 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*446 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*448 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*491 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*554 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*611 <=< must be installed BEFORE `SD*5.3*645'
                   (v)SD*5.3*622 <=< must be installed BEFORE `SD*5.3*645'

```

Subject: CID/PREFERRED DATE IN SCHEDULING

Category: DATA DICTIONARY  
ROUTINE  
PRINT TEMPLATE  
ENHANCEMENT

Description:

=====

The Veterans Health Administration (VHA) Access and Clinic Administrative Program (ACAP) has requested an enterprise enhancement for the Vista Scheduling Package. The enhancement will reduce operating cost for VHA and improve operational efficiencies resulting in patient centered access to care, coordinated care, increased customer satisfaction, and the reduction of excessive cycle/wait time used for scheduling patients.

This patch adds the title 'CID/PREFERRED DATE' to the fields named 'DESIRED DATE OF APPOINTMENT' in the PATIENT file (#2), the SD WAIT LIST file (#409.3), and the SD TRANSFER ACCEPT file (#409.36). The new title and each field name will be considered equivalent from this patch forward. The abbreviation 'CID' stands for Clinically Indicated Date. This new title will be used in Scheduling where 'DESIRED DATE' is presented to the user while making a new appointment or displaying appointment information. Additionally, users will be able to use the new title when creating reports via FileMan or executing print options where 'DESIRED DATE' had been used. In some reports where there is a space limitation, the abbreviation 'CID/PD' will be used to indicate the new title.

This patch also corrects the population of the FOLLOW-UP VISIT in Extended Display (EP) under the option Appointment Management [SDAM APPT MGT], and the CLINIC WAIT TIME2 when displaying any of the appointments in a series (multiple appointments).

Patch Components:

-----

Files & Fields Associated:

File Name (Number)	Field Name (Number)	New/Modified/Deleted
PATIENT (2)	DESIRED DATE OF APPOINTMENT (27)	Modified
SD WAIT LIST (409.3)	DESIRED DATE OF	Modified

SDWL TRANSFER ACCEPT (409.36)	APPOINTMENT (22) DESIRED DATE OF APPOINTMENT (22)	Modified	
Forms Associated:			
Form Name ----- N/A	File # -----	New/Modified/Deleted -----	
Mail Groups Associated:			
Mail Group Name ----- N/A		New/Modified/Deleted -----	
Options Associated:			
Option Name ----- N/A	Type -----	New/Modified/Deleted -----	
Protocols Associated:			
Protocol Name ----- N/A		New/Modified/Deleted -----	
Remote Procedure Calls Associated:			
Remote Procedure Call Name ----- N/A		New/Modified/Deleted -----	
Security Keys Associated:			
Security Key Name ----- N/A			
Templates Associated:			
Template Name -----	Type -----	File Name (Number) -----	New/Modified/Deleted -----
SDWL30DAY	PRINT	SD WAIT LIST (409.3)	Modified
SDWLRO	PRINT	SD WAIT LIST (409.3)	Modified
SDWLWTR	PRINT	SD WAIT LIST (409.3)	Modified
Additional Information: N/A			
New Service Requests (NSRs): ----- N/A			
Patient Safety Issues (PSIs): ----- N/A			
Remedy Ticket(s) & Overview: ----- N/A			
Test Sites: ----- Asheville Hudson Valley Salt Lake City Chillicothe			

Software and Documentation Retrieval Instructions:

-----  
Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.

The preferred method is to retrieve files from download.vista.med.va.gov. This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
Hines: fo-hines.med.va.gov  
Salt Lake City: fo-slc.med.va.gov>

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library at: <http://www4.va.gov/vd1/>

Title	File Name	FTP Mode
SCHEDULING Appt Menu	VSE_APPT.PDF	(binary)
SCHEDULING Technical Manual	VSE_TM.PDF	(binary)

Patch Installation:

Pre/Post Installation Overview:

-----  
N/A

Pre-Installation Instructions:

-----  
This patch may be installed with users on the system although it is recommended that it be installed during non-peak hours to minimize potential disruption to users. This patch should take less than 5 minutes to install.

If installed during the normal workday, it is recommended that the following entries in the OPTION file (#19) be disabled to prevent possible conflicts while running the KIDS Install. Other Vista users will not be affected.

Scheduling Menu	[SDUSER]
Wait List (Sch/PCMM) Menu	[SD WAIT LIST MENU]
Wait List (Sch/PCMM) Reports	[SD WAIT LIST REPORTS MENU]

Installation Instructions:

- 
1. Choose the PackMan message containing this patch.
  2. Choose the INSTALL/CHECK MESSAGE PackMan option.
  3. From the Kernel Installation and Distribution System Menu, select the Installation Menu. From this menu, you may elect to use the following options. When prompted for the INSTALL NAME enter the patch #(SD\*5.3\*645):
    - a. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDS or templates.
    - b. Compare Transport Global to Current System - This option will

allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DDs, templates, etc.).

c. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.

4. From the Installation Menu, select the Install Package(s) option and choose the patch to install. Enter SD\*5.3\*645
5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//' press 'Enter'
6. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//' press 'Enter'
7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' respond YES
  - a) When prompted 'Enter options you wish to mark as "Out of Order":', enter the following:
 

Scheduling Menu	[SDUSER]
Wait List (Sch/PCMM) Menu	[SD WAIT LIST MENU]
Wait List (Sch/PCMM) Reports	[SD WAIT LIST REPORTS MENU]
  - b) When prompted 'Enter protocols you wish to mark as "Out of Order":', just press ENTER.
8. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond 0.

Post-Installation Instructions:  
-----  
N/A

Routine Information:  
=====

The second line of each of these routines now looks like:  
;;5.3;Scheduling;\*[Patch List]\*;AUG 13, 1993;Build 7

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: SCR PW62	Before: B35851518	After: B38498572	**267,269,358,491,645**
Routine Name: SCR PW77	Before: B100471899	After: B111268055	**223,241,291,645**
Routine Name: SCR PW78	Before: B18943883	After: B20645395	**291,645**
Routine Name: SDAMEP3	Before: B19773146	After: B21041626	**20,241,645**
Routine Name: SDM0	Before: B92285197	After: B93886442	**140,167,206,186,223,237,241,384,334,547,621,622,645**
Routine Name: SDM2A	Before: B21288152	After: B21850662	**446,528,567,594,611,645**
Routine Name: SDMM1	Before: B15878644	After: B16255799	**28,206,168,327,622,645**
Routine Name: SDWL120	Before: B7543417	After: B7897103	**446,645**
Routine Name: SDWLE110	Before: B24136390	After: B23562010	**263,273,424,454,554,645**
Routine Name: SDWLE7	Before: B15146200	After: B14943839	**446,645**
Routine Name: SDWLI	Before: B76987504	After: B79675388	**263,327,394,446,524,505,611,645**

Routine Name: SDWLIFT3	Before: B62360655	After: B62511843	**415,446,645**
Routine Name: SDWLIFT6	Before: B60221443	After: B60758561	**415,446,645**
Routine Name: SDWL RAD	Before: B20939529	After: B20910333	**263,645**
Routine Name: SDWLROF	Before: B30475987	After: B31584484	**263,414,645**
Routine Name: SDWLROS	Before: B33019881	After: B32624484	**263,414,645**
Routine Name: SDWL RPS1	Before: B42004976	After: B41748823	**263,412,645**
Routine Name: SDWL RPT1	Before: B43599634	After: B45492477	**263,399,394,645**
Routine Name: SDWL RQ1	Before: B39567538	After: B40571252	**263,399,412,425,448,645**
Routine Name: SDWLWTR	Before: B2642955	After: B2690330	**419,645**

Routine list of preceding patches: 291, 414, 419, 448, 491, 554, 611, 622

## 5.6. GMRC\*3.0\*83

```
=====
Run Date: APR 15, 2016           Designation: GMRC*3*83
Package : CONSULT/REQUEST TRACKING Priority  : MANDATORY
Version : 3                     Status   : UNDER DEVELOPMENT
=====
```

Subject: SUPPORT FOR VISTA SCHEDULING ENHANCEMENTS E1-E2

Category: ROUTINE  
          ENHANCEMENT  
          DATA DICTIONARY

Description:  
=====

This patch will support the Vista Scheduling Enhancements E1-E2 project with data dictionary changes in the REQUEST/CONSULTATION file #123. A brand new MUMPS cross reference ("AG") is created in the file for the exclusive use of a report from patch SD\*5.3\*627.

PLEASE TAKE NOTICE: GMRC\*3.0\*83 MUST BE INSTALLED BEFORE SD\*5.3\*627.  
Any Vista application that would normally make changes to file #123 must not do so until after this patch has completed installation. The time to complete installation depends on the number of entries recorded in the file.

Patch Components  
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Files & Fields Associated:

File Name (#)	Field Name (#)	NEW/MODIFIED/DELETED
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REQUEST/CONSULTATION (123)	REQUEST PROCESSING ACTIVITY (40)	MODIFIED

Forms Associated: N/A

Mail Groups Associated: N/A

Options Associated: N/A

Protocols Associated: N/A

Security Keys Associated: N/A

Templates Associated: N/A

Additional Information: N/A

New Service Requests (NSRs):  
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N/A

Patient Safety Issues (PSIs):  
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N/A

Remedy Ticket(s) & Overviews:  
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N/A

Test Sites:

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Asheville  
Hudson Valley  
Salt Lake City  
Chillicothe

Software and Documentation Retrieval Instructions:

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Software being released as a host file and/or documentation describing the new functionality introduced by this patch are available.

The preferred method is to retrieve files from download.vista.med.va.gov. This transmits the files from the first available server. Sites may also elect to retrieve files directly from a specific server.

Sites may retrieve the software and/or documentation directly using Secure File Transfer Protocol (SFTP) from the ANONYMOUS.SOFTWARE directory at the following OI Field Offices:

Albany: fo-albany.med.va.gov  
Hines: fo-hines.med.va.gov  
Salt Lake City: fo-slc.med.va.gov>

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library at: <http://www4.va.gov/vdl/>

File Description	File Name	FTP Mode
Consult/Request Tracking Technical Manual	CONSTM.PDF	binary

Patch Installation:

Pre/Post Installation Overview

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There is not a Pre-Installation routine.  
The Post-Installation routine does the following functions:  
1. Initializes a new Mumps cross-reference:  
- "AG" in the REQUEST/CONSULTATION file 123

Pre-Installation Instructions

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Given that this patch takes some time to install, the following instructions are provided to assist OI&T personnel with its installation and output capture without having to tie up a computer screen. Just before selecting the device for the installation output, perform the following steps to queue the installation:

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

DEVICE: HOME// QUEUE TO PRINT ON DEVICE: HOME// P-MESSAGE

1 P-MESSAGE-ABC HFS FILE => MESSAGE  
2 P-MESSAGE-HFS HFS FILE => MESSAGE

Choose 1-2> 2 P-MESSAGE-HFS HFS FILE => MESSAGE

Subject: PATCH GMRC\*3.0\*83 QUEUED INSTALL <== enter this Subject title

Select one of the following:

M Me  
P Postmaster

From whom: Me// Send mail to: DOEIRM,JOHN// <=<= Your name will echo here  
Select basket to send to: IN// And Send to:

Request Start Time: Jun 24, 2015@14:37:20// T@14:40 (JUN 24, 2015@14:40:00)  
Install Queued!

Note: once the installation has completed, you should have a Mailman message in  
your 'IN' box.

#### Installation Instructions

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This patch should not be installed with users on the system and it is  
recommended that it be installed during non-peak hours. The installation time  
will vary from site to site depending on the size of file #123.

1. Choose the PackMan message containing this patch.
2. Choose the INSTALL/CHECK MESSAGE PackMan option.
3. From the Kernel Installation and Distribution System Menu, select  
the Installation Menu. From this menu, you may elect to use the  
following option. When prompted for the INSTALL enter the patch #  
(GMRC\*3.0\*83):
  - a. Backup a Transport Global - This option will create a backup  
message of any routines exported with this patch. It will not  
backup any other changes such as DD's or templates.
  - b. Compare Transport Global to Current System - This option will  
allow you to view all changes that will be made when this patch  
is installed. It compares all components of this patch  
(routines, DD's, templates, etc.).
  - c. Verify Checksums in Transport Global - This option will allow  
you to ensure the integrity of the routines that are in the  
transport global.
4. From the Installation Menu, select the Install Package(s) option and  
choose the patch to install. Enter GMRC\*3.0\*83.
5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of  
Install? NO//', respond NO.
6. When prompted 'Want KIDS to INHIBIT LOGONS during the install? NO//',  
respond NO.
7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and  
Protocols? NO//', respond NO
8. If prompted 'Delay Install (Minutes): (0 - 60): 0//', respond 0.

#### Post-Installation Instructions

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N/A

#### Routine Information:

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The second line of each of these routines now looks like:  
;;3.0;CONSULT/REQUEST TRACKING;\*[Patch List]\*\*;Dec 27, 1997;Build 11

The checksums below are new checksums, and can be checked with CHECK1^XTSUMBLD.

Routine Name: GMRCXR  
Before: n/a After: B34169214 \*\*83\*\*

## 6. Patch Rollback Plan(s)

While a site can run the standard patch removal tool to back the patches out, these patches contain changes to a Data Dictionary which can't be automatically backed out. In the event that a site determines rollback is required, the site should submit a Remedy ticket with the NSD and have the development support team assist with the rollback. Below is the specific information for each patch.

### 6.1. SD\*5.3\*627

Multiple Data Dictionary changes, inputs templates, and new cross references were approved for change in this patch. Due to the complexity of this patch, it is not recommended for roll back.

### 6.2. SD\*5.3\*628

One cross reference ("D") for the Outpatient Encounter file (#409.68) was created for this patch. To roll back the patch, submit a Remedy ticket so the development support team to assist.

### 6.3. SD\*5.3\*642

Multiple Data Dictionary changes were changed for this patch. Due to the complexity of this patch, it is not recommended for roll back.

### 6.4. SD\*5.3\*643

Multiple Data Dictionary changes and one input template were changed for this patch. Because this patch is a dependency for patch SD\*5.3\*642, it is not recommended for roll back.

### 6.5. SD\*5.3\*645

Multiple Data Dictionary changes and print templates were change for this patch. Due to the integration of this patch with the patch SD\*5.3\*627changes for the VS GUI, it is not recommended to roll back this patch.

### 6.6. GMRC\*3.0\*83

One MUMPS cross reference ("AG") was created for this patch in REQUEST/CONSULTATION file (#123). This patch is not recommended for roll back because of its tight integration with SD\*5.3\*627.

### 6.7. VS GUI

The VS GUI can be uninstalled under Control Panel > Add/Remove Programs



## Appendix A. Release Notes

### A.1. Introduction

VA has a need to improve the efficiencies of the outpatient medical scheduling processes through improved visibility of information. Over the next few years, VA will create a comprehensive scheduling solution that will modernize VistA scheduling. In order to facilitate transition to the new business processes, VA requires enhancements to the current VistA scheduling system.

#### A.1.1. Purpose

The purpose of this document is to provide a summary of enhancements and new features to the VistA Scheduling package as implemented in VS GUI v2.0.0.5, GMRC\*3.0\*83, SD\*5.3\*642, SD\*5.3\*643, SD\*5.3\*645, SD\*5.3\*627 and SD\*5.3\*628.

#### A.1.2. Audience

This document targets users and administrators of the VistA Scheduling package, version 5.3.

### A.2. This Release

The following sections provide, in brief, the new features and functions added to the VSE project and the VS GUI.

### A.3. Features and Functionality

The following features are included in the VS GUI v 2.0.0.5, patch GMRC\*3.0\*83, SD\*5.3\*627, SD\*5.3\*628, SD\*5.3\*643, SD\*5.3\*642, and SD\*5.3\*645 release:

**Enhancement 1:** VHA requires an aggregated (combined) view of clinic profile scheduling grids to allow the user to view the resource's availability collectively and decrease the time it takes to match an available resource with the patient's request and improve the appointment scheduling process. Enhancement 1 provides an aggregated view of clinic profile scheduling grids for VistA Scheduling to include:

- A standard tool for viewing and scheduling aggregated resources in order to improve performance for appointment scheduling
- Improved visibility into resources across clinic profiles
- Exposes previously underutilized resources
- Improves business processes and efficiency

**Enhancement 2:** This enhancement consolidates information from multiple appointment request sources so all patient requests are available collectively to be queried, filtered, and sorted to improve the appointment scheduling process. The single queue of request lists for appointment requests provides immediate, incremental relief to the field, including:

- Promotes a standard tool for consolidating, viewing, sorting and prioritizing appointment requests in order to improve performance for appointment scheduling
- Improves the business' ability to accurately prioritize patient appointment needs regardless of method of request and work list

- Improves business processes and efficiency by streamlining the process and removing duplication
- Eliminates waste in a Scheduler's workload processes related to appointment requests

#### **New Service Request (NSR) #002:**

- The aggregated request list functionality built into the VS GUI must be separated from the wait list file structure in VistA.
- Assigning of schedulers to clinics must be done on an exclusionary instead of the current inclusionary basis.
- The current capability to link multiple appointments to a single appointment request must be replaced by a one-to-one linkage (one appointment request per appointment).
- The aggregated request list functionality built into the VS GUI will only display Wait Lists associated with Clinics whose clinic profiles allow such display.
- In multiple return to clinic scenarios (multi-book appointments), VS GUI calculation of subsequent Desired Dates based on initial Appointment Booking Date rather than initial Desired Date.

**Veteran Appointment Request (VAR) Interface:** Provides an interface between the VS GUI and the VAR appointment request database, including:

- Link an appointment requested in VAR and processed in VistA such that the state of the appointment in VistA (e.g. cancelled, checked out) can be displayed in the VS GUI application
- View appointment requests within VS GUI
- Communicate or message the Veteran from within VS GUI up to a limit of four times
- Close out requests from VS GUI

**Optional Task #3 (OT3):** Three enhancements to the VS GUI have been identified by VHA to support the Scheduling workflow and policy:

- Appointments generated from Consults in CPRS shall use the Consult **Earliest Appropriate Date** to populate the **DESIRED/RECALL DATE** and **ENTERED/RR NO DATE** fields in the VS GUI when a value is present other than **Today's** date (as set as default by CPRS) and is not equal to the Appointment Entered Date.
- Remove functionality in Legacy VistA Scheduling and VS GUI that provided the ability to hide appointment requests associated with Wait Lists associated with Clinics
- Veteran Disabilities will be displayed in the VS GUI to aid in determining eligibility for specific clinics

**Optional Task #4 (OT4) Functionality** consists of additional enhancements identified by VHA to support the Scheduling workflow and policy:

- The VSE GUI shall follow the same rules as in VistA for Overbooking and Master Overbooking Security keys.
- The VSE GUI shall display number of available appointment slots in the calendar view for the clinic within each appointment time slot to allow booking of several appointments.

- The VSE GUI shall have a consistent color visual indication for the following:
  - Hours of operation.
  - Non-workable hours during that specific day (after hours bookable using a key).
  - No appointment can ever be booked.
  - Clinic inactive.
  - Holiday but bookable.
  - Holiday but NOT bookable.
  - No availability created for the clinic.
- The VSE GUI shall allow entering variable length appointments only for clinics with variable appointment lengths defined in the VistA Clinic Setup Parameters.
- The VSE GUI shall display a visual indicator for clinics that allow variable appointment lengths.
- The VSE GUI shall display special clinic instructions on the screen e.g. “only make new appointments on Tuesday and Thursday”.
- The VSE GUI shall NOT shall display Occasion of Service Clinics (OOS) - (field 50.01 = yes is the OOS indicator) including drop down lists.
- The VSE GUI shall display message "No availability was created for the clinic" when a grid does not exist for the clinic (example: VCL and admin clinics) similar to current VistA Scheduling processing.
- The VSE GUI shall allow for entering 'CID/Preferred Date' and/or appointment date within the appointment requests using past dates.
- Multi-book Enhancement GUI.
- For inpatients, the VSE GUI shall display ward location in patient demographic area for each patient.
- Comp & Pension Appointments need to be linked to the 2507 Request as it currently does in VistA.
- Multi-Appointment Booking Wait Time.
- Scheduling ‘Desired Date’ Change.
- Recall Reminder Parameters.
- Recall Reminder Print Failures.
- Modification to VistA Recall Reminders.

**Enhancement 3:** Enhancement 3 provides a consolidated view of resource management metrics related to scheduling supply and demand, for appropriate organizational components (e.g., clinic, facility levels). The tool is referred to as Resource Management Reporting. The enhancement provides aggregate views of Legacy VistA Scheduling data and does not directly contain Personally Identifiable Information (PII) data.

## Appendix B. Known Issues

1. Some sites have reported that previous versions of the GUI do not remove all associated files and remains under the Add/Remove section of Windows
2. The VSE GUI requires read/write permissions for users at the Windows Icon level. Some sites have reported issues with the GUI performance. The development team recommended setting user permission at the Window Icon level to “Full Control” to resolve the issue. This issue may be related to local rules regarding default access privileges.
3. Single Sign-on (SSO) sometimes has issues with interfacing with the VSE GUI. While this was not a requirement for VSE to interact with the SSO software, the team believes this issue is caused by too many connection attempts. This issue does not occur unless VistA is accessed prior to launching the VS GUI. The work around is to clear the cache in the SSO application.
4. The management reports feature of the VSE GUI requires a special installation that is specific to the user’s Windows profile known as installing for “just me.” The ability to support this with the ESE SCCM software deployment package is available and will require users that need to access the management reports to manually install the GUI under their Windows profile.
5. Sites report that Management reports, specifically ones that search data for up to a year take too long to run. There may be a technical limit on the window of data searches based on the size of site. The team will work with the business owner to assess impact. The CID/Preferred Date in the Cancel Appointment Dialog is not supposed to be editable if the appointment is being Cancelled by Clinic.
6. Walk-in appointments turn green when checked in when it should stay blue to indicate it is a walk-in.
7. Appointments created via the Multiple Appointment Booking [SDMULTIBOOK] are not displaying in VS GUI.