Update _2_0_86

Clinical Reminders

VA-PC3 VETERAN CARE AGREEMENT

Install Guide

JUNE 2019

Product Development
Office of Information Technology
Department of Veterans Affairs

Table of Contents

Introduction

Description:

As part of the new Mission Act, VA is continuing to develop processes across all areas of the organization to purchase care when it is not feasibly available through a VA facility, contract or sharing agreement. Edits to the 10-0386a form are a critical piece of both the overall standardization as well as a step in providing authorizations to community providers. National rollout of the edits to the 10-0386a form allows sites to authorize Veteran Care Agreements for our Veterans.

UPDATE_2_0_86 contains 1 Reminder Exchange entry:
> **UPDATE_2_0_86 VA-PC3 VETERAN CARE AGREEMENT**

The exchange file contains the following components:

TIU TEMPLATE FIELD
> VA-10-0386A EDIT 30-40
> VA-10-0386A EDIT 30-40 REQ
> DATE (*)
> VA-10-0386A WP 2 LINE REQ
> TEXT NO SEOC INFORM
> VA-10-0386A WP 2 LINE
> TEXT COPY AND PASTE SEOC
> VA-10-0386A APPOINTMENT COMMENT TXT
> DATE & TIME (REQ)
> VA-10-0386 CALENDAR REQ
> VA-10-0386 CID TXT
> VA-10-0386B USE OF PROVIDER AGRMNT LIST
> TEXT (1-60 CHAR)R
> VA-10-0386 EDIT 30-40
> VA-10-0386 ALT POC TXT
> VA-10-0386 EDIT 40
> VA-10-0386 WP 2 LINE
> VA-10-0386 EDIT 40 REQ
> TEXT (1-30 CHAR) REQ
> VA-10-0386 CALENDAR
> VA-10-0386 PLEASE NOTE TXT
> VA-10-0386 WP 2 LINE REQ
> VA-10-0386 NUMBER OF VISITS TXT
> VA-10-0386 SERVICE/PROCEDURE TXT
> VA-10-0386 SPECIALIST TXT
> VA-10-0386 CAT OF CARE TXT
> TEXT (1-60 CHAR)1
> VA-10-0386A EDIT 40 REQ
> VA-10-0386 AA# PLEASE SPECIFY

AK-10-0386A SAR STATEMENT INFO1
VA-10-0386 WORD 70-3 REQ
AK-10-0386A SAR STATEMENT INFO6
AK-10-0386A SAR STATEMENT INFO4
AK-10-0386A SAR STATEMENT INFO5
AK-10-0386A SAR STATEMENT INFO2
DATE NOW DEFAULT
EDIT 20 10-0386 SCH
EDIT 50 CHOICE
TEXT (1-20 CHAR REQ)
TEXT (1-3)REQ
TEXT (1-20 CHAR) REQ
ANC-10-0389-SCH SERVICE/VISIT INFO DISPLAY
WP 1 LINE REQ1
VA-CID DISPLAY TEXT1

HEALTH FACTORS
VA-REMINDER UPDATES
VA-UPDATE_2_0_86
COMMUNITY CARE
PC3 APPOINTMENT
PC3 SECONDARY AUTH DISAPPROVED
PC3 SECONDARY AUTH TIME & SERVICES
PC3 SECONDARY AUTH SERVICES
PC3 SECONDARY AUTH TIME
PC3 SECONDARY AUTHORIZATION
PC3 10-0386 URGENT
PC3 10-0386 ROUTINE
VETERANS CHOICE
CHOICE UN/EX BURDEN
CHOICE FIRST SERVICES UA
CHOICE 40 MILE
CHOICE 30 DAY

REMINDER SPONSOR
VHA Office of Community Care

REMINDER TERM
VA-REMINDER UPDATE_2_0_86

REMINDER DIALOG
VA-VHA PC3/VETERAN CARE AGRMNT

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_86.PRD

The file will be installed using Reminder Exchange, programmer access is not required.

Installation:
=============
This update can be loaded with users on the system. Installation will take less than 10 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            LR    List Reminder Definitions
DFE   Delete Exchange File Entry        LWH   Load Web Host File
IFE   Install Exchange File Entry       RI    Reminder Definition Inquiry
IH    Installation History              RP    Repack
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_86.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_86.PRD

```
http://vista.med.va.gov/reminders/UPDATE_2_0_86.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_86 VA-PC3 VETERAN CARE AGREEMENT** in reminder exchange.

```
+Item    Entry                          Source                Date Packed
   180   UPDATE_2_0_86 VA-PC3 VETERAN   GRIFFITH@SALT LAKE CI 05/31/2019@11:36
         CARE AGREEMENT
   181   UPDATE_2_0_9 VA-COLORECTAL     GRIFFITH@SALT LAKE CI 03/20/2018@08:45
         CANCER SCREENING
   182   V7-HIV SCREENING (2012)        MURPHY@ATLANTA VAMC   01/09/2019@14:51
   183   V7-HIV SCREENING (2012)        GRIFFITH@ZZ ALBANY    01/10/2019@06:25
   184   V7-HIV SCREENING (2012)        GRIFFITH@ZZ ALBANY    01/10/2019@08:54
   185   VA BRANCHING LOGIC REMINDER    VOLPP@NORTHERN CAL    09/13/2010@11:42
         UPDATES OEF/OIF
   186   VA MH SCREENING REMINDERS      VOLPP@NORTHERN CAL    09/13/2010@11:36
+           + Next Screen    - Prev Screen    ?? More Actions          >>>
CFE   Create Exchange File Entry        LHF   Load Host File
CHF   Create Host File                  LMM   Load MailMan Message
CMM   Create MailMan Message            LR    List Reminder Definitions
DFE   Delete Exchange File Entry        LWH   Load Web Host File
IFE   Install Exchange File Entry       RI    Reminder Definition Inquiry
IH    Installation History              RP    Repack
Select Action: Next Screen// IFE    Install Exchange File Entry
Enter a list or range of numbers (1-273): 180
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry

Enter the number that corresponds with your entry titled **UPDATE_2_0_86 VA-PC3 VETERAN CARE AGREEMENT** *(in this example it is entry 180 it will vary by site)*

```
      Component                                    Category      Exists
Source:      GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 05/31/2019@11:36:32
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-VHA PC3/VETERAN CARE AGRMNT

REMINDER TERM
  VA-REMINDER UPDATE_2_0_86
Non-exchangeable TIU object(s):
-------------------------------------------------------------------------
TIU Object: PATIENT NAME
Object Method: S X=$$NAME^TIULO(DFN)


+           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.

Select Action: Next Screen// IA   Install all Components

You will see several prompts, for all new entries you will choose **I to Install**

For components that already exists but the packed component is different, you will choose **O to Overwrite.**

You will be prompted to install the reminder dialog component:

```
Packed reminder dialog: VA-VHA PC3/VETERAN CARE AGRMNT [NATIONAL DIALOG]

 Item  Seq. Dialog Findings                                    Type      Exists
    1      VA-VHA PC3/VETERAN CARE AGRMNT                       dialog

    2    1 VA-PC3/VETERAN CARE AGRMNT OPTION NOTE VERSION       element
            Finding: *NONE*

    3    5 VA-GP PC3/VETERAN CARE AGRMNT OPTION                 group
            Finding: *NONE*
    4    5.10 VA-GP PC3 PROGRAM                                 group
            Finding: *NONE*
    5    5.10.5 GP VHA CHOICE/PCCC VA SCHEDULES                 group       X
            Finding: *NONE*
    6    5.10.5.10 GP-10-0386-SCH MAIN                          group       X
            Finding: *NONE*
    7    5.10.5.10.10 GP-10-0386-SCH APPROVAL AUTH              group       X
            Finding: *NONE*
+         + Next Screen   - Prev Screen   ?? More Actions
DD   Dialog Details      DT   Dialog Text        IS   Install Selected
DF   Dialog Findings     DU   Dialog Usage       QU   Quit
DS   Dialog Summary      IA   Install All
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** to install the dialog – **VA-VHA PC3/VETERAN CARE AGRMNT** Select Action: Next Screen// IA   Install All

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

```
Packed reminder dialog: VA-VHA PC3/VETERAN CARE AGRMNT [NATIONAL DIALOG]
VA-VHA PC3/VETERAN CARE AGRMNT (reminder dialog) installed from exchange file.
 Item  Seq. Dialog Findings                                    Type      Exists
    1      VA-VHA PC3/VETERAN CARE AGRMNT                       dialog      X

    2    1 VA-PC3/VETERAN CARE AGRMNT OPTION NOTE VERSION       element     X
            Finding: *NONE*

    3    5 VA-GP PC3/VETERAN CARE AGRMNT OPTION                 group       X
            Finding: *NONE*
    4    5.10 VA-GP PC3 PROGRAM                                 group       X
            Finding: *NONE*
    5    5.10.5 GP VHA CHOICE/PCCC VA SCHEDULES                 group       X
            Finding: *NONE*
    6    5.10.5.10 GP-10-0386-SCH MAIN                          group       X
            Finding: *NONE*
    7    5.10.5.10.10 GP-10-0386-SCH APPROVAL AUTH              group       X
            Finding: *NONE*
+         + Next Screen   - Prev Screen   ?? More Actions
DD   Dialog Details      DT   Dialog Text        IS   Install Selected
DF   Dialog Findings     DU   Dialog Usage       QU   Quit
DS   Dialog Summary      IA   Install All
Select Action: Next Screen// Q
```

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

```
      Component                                              Category    Exists
Source:       GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 05/31/2019@11:36:32
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-VHA PC3/VETERAN CARE AGRMNT

REMINDER TERM
  VA-REMINDER UPDATE_2_0_86
Non-exchangeable TIU object(s):
-------------------------------------------------------------------------
TIU Object: PATIENT NAME
Object Method: S X=$$NAMEˆTIULO(DFN)

+         + Next Screen   - Prev Screen   ?? More Actions             >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// Q
```

You will then be returned to this screen. At the **Select Action** prompt, type **Q.**

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: **CP CPRS Reminder Configuration**
      CA   Add/Edit Reminder Categories
      CL   CPRS Lookup Categories
      CS   CPRS Cover Sheet Reminder List
      MH   Mental Health Dialogs Active
      PN   Progress Note Headers
      RA   Reminder GUI Resolution Active
      TIU   TIU Template Reminder Dialog Parameter
      DL   Default Outside Location
      PT   Position Reminder Text at Cursor
   Select CPRS Reminder Configuration Option: **TIU TIU Template Reminder Dialog Parameter**
   Reminder Dialogs allowed as Templates may be set for the following:
   1   User   USR   [choose from NEW PERSON]
   3   Service   SRV   [choose from SERVICE/SECTION]
   4   Division   DIV   [choose from INSTITUTION]
   5   System   SYS   [NATREM.FO-SLC.MED.VA.GOV]
   Enter selection: **5** *Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level*

Setting Reminder Dialogs allowed as Templates for System:
Select Display Sequence: **?**

148   VA-VETERANS CHOICE NOTE
149   VA-TBI SCREENING
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-VHA PC3/VETERAN CARE AGRMNT then **<enter>** reminder dialog
NATIONAL
OK? Yes// **<Enter>** (Yes)

2. **Setup of Note title/ Associate the reminder dialog with the note title or shared template in CPRS**
   a. The **VA-VHA PC3/VETERAN CARE AGRMNT** template should be set up with its own note title.

   Using the document definition manager, create the following note title in the document class where other community care notes are stored at your facility.
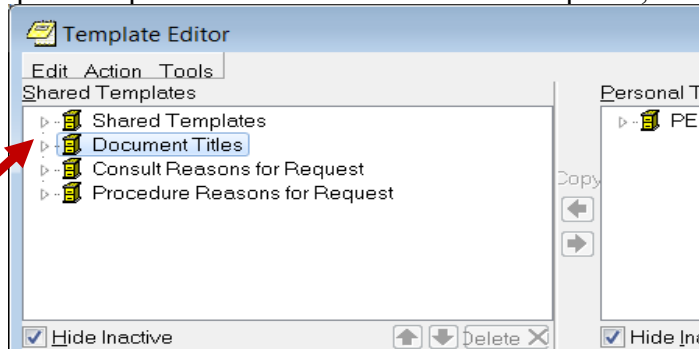
   Name: *COMMUNITY CARE-SCHEDULING*
   VHA Enterprise Standard Title: NONVA NOTE

   Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the TIU/ASU Implementation Guide.

   b. You will need to connect the document definition to the reminder dialog **VA-VHA PC3/VETERAN CARE AGRMNT**

Open Template Editor and from Shared Templates, select File "Document Titles"
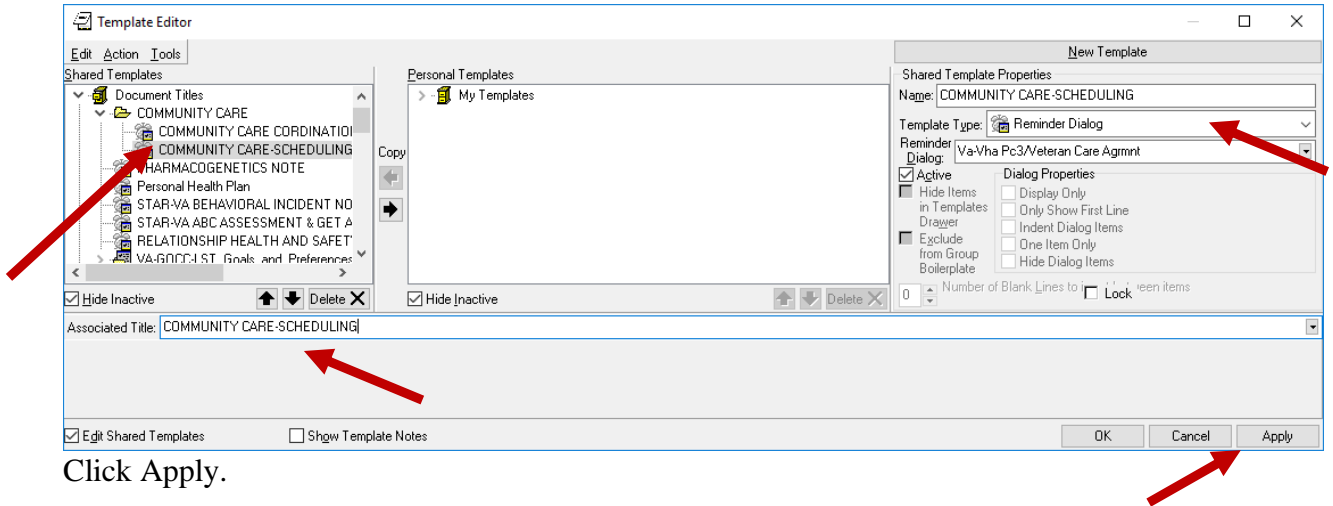
Click 'triangle' to left of Document Titles to expand. Click New template to create a new template. Enter the following information:

        Name: COMMUNITY CARE-SCHEDULING
        Template Type: Reminder dialog
        Reminder Dialog: VA-VHA PC3/VETERAN CARE AGRMNT
        Associated Title: COMMUNITY CARE-SCHEDULING

Click Apply.

3. Add your local contact information and local data objects to the following Groups and elements:

Using the menu Reminder Dialog Management, Reminder Dialogs, change your view to Group. Search for and edit the following groups:

    a. VAL-GP VHA FORM 10-0386 LOCAL VHA INFO – The dialog text looks like this:

```
Facility Community Care Office Contact:    \\
Facility Community Care office manager or Equivalent:  \\
Name:  {FLD:VA-10-0386 EDIT 40 REQ}           \\
Title: {FLD:VA-10-0386 EDIT 40 REQ}            \\
```

Entries in RED may be hard coded for ease of entry by users

    b. VAL-GP VCP FORM 10-0386A VETERAN INFORMATION- The dialog text looks like this:

```
\\
Veteran Information:                             \\
Name:     {FLD:VA-10-0386A EDIT 30-40}          \\
DOB:      {FLD:VA-10-0386A EDIT 30-40}          \\
SSN:      {FLD:VA-10-0386A EDIT 30-40}          \\
Address:  {FLD:VA-10-0386A WP 2 LINE}          \\
Phone:    {FLD:VA-10-0386A EDIT 30-40}          \\
Veteran's Alternate Phone:  {FLD:VA-10-0386A EDIT 30-40}   \\
Veteran's Alterate Address: {FLD:VA-10-0386A EDIT 30-40}    \\
  \\
```

```
Veteran Alterate Point of Contact (POC) name:
{FLD:VA-10-0386A EDIT 30-40}                                 \\
Alternate POC Address: {FLD:VA-10-0386A EDIT 30-40}     \\
Alternate POC Phone:   {FLD:VA-10-0386A EDIT 30-40}     \\
\\
```

<u>Entries in RED</u> may be hard coded for ease of entry by users
<u>Entries in BLUE</u> are usually not available to hard code…however longer fields
may be added if needed.

    c.   VAL-GP VCP FORM 10-0386A LOCAL VHA OCC CONTACT
       INFORMATION - The dialog text looks like this:

```
Facility Community Care Manager or Equivalent:          \\
Name:  {FLD:VA-10-0386A EDIT 30-40 REQ}                 \\
Title:  {FLD:VA-10-0386A EDIT 30-40 REQ}               \\
\\
Facility Community Care Office \\
Contact Number (Normal Business Hours):                \\
{FLD:VA-10-0386A EDIT 30-40 REQ}                       \\
\\
From Station Number: {FLD:VA-10-0386A EDIT 30-40}       \\
Facility Name:   {FLD:VA-10-0386A EDIT 30-40}           \\
Street Address:  {FLD:VA-10-0386A EDIT 30-40}           \\
City:  {FLD:VA-10-0386A EDIT 30-40}                     \\
State: {FLD:VA-10-0386A EDIT 30-40}                     \\
Zip:   {FLD:VA-10-0386A EDIT 30-40}                     \\
Fax:   {FLD:VA-10-0386A EDIT 30-40}                     \\
```

<u>Entries in RED</u> may be hard coded for ease of entry by users

Using the menu Reminder Dialog Management, Reminder Dialogs, change your view to
Element. Search for and edit the following elements:

    d.   VAL-10-0386-SCH APPROVAL AUTH VAMC INFO - The dialog text looks
       like this:

```
FACILITY COMMUNITY CARE MANAGER:
 Name: {FLD:TEXT (1-30 CHAR) REQ}
Title: {FLD:TEXT (1-30 CHAR) REQ}

Report all CRITICAL FINDINGS related to this authorization to
the issuing
office below. ALL other questions regarding this authorization
should be
directed to:  {FLD:TEXT (1-20 CHAR) REQ}

FACILITY COMMUNITY CARE OFFICE CONTACT:
 Number (Normal Business Hours):
   {FLD:TEXT (1-20 CHAR) REQ}
 AOD/Emergency Contact After Hours Number:
   {FLD:TEXT (1-20 CHAR) REQ}

VAMC ISSUING STATION:                                  \\
```

```
From Station #: {FLD:TEXT (1-3)REQ}           \\
Facility Name:  {FLD:TEXT (1-30 CHAR) REQ}   \\
Street Address: {FLD:TEXT (1-30 CHAR) REQ}   \\
City:           {FLD:TEXT (1-30 CHAR) REQ}   \\
State:          {FLD:TEXT (1-30 CHAR) REQ}   \\
Zip:            {FLD:TEXT (1-30 CHAR) REQ}   \\
Fax: {FLD:TEXT (1-20 CHAR REQ)}              \\
```

Entries in RED may be hard coded for ease of entry by users

e. VAL-10-0386-SCH APPROVAL AUTH4- The dialog text looks like this:
```
Veteran Information:\\
Name: |PATIENT NAME|\\
DOB:  |PATIENT DATE OF BIRTH|\\
SSN:  |PATIENT SSN|\\
Address: {FLD:EDIT 20 10-0386 SCH}          \\
Phone:   {FLD:EDIT 20 10-0386 SCH}          \\
Veteran Alternate Phone: {FLD:EDIT 20 10-0386 SCH} \\
```

You can replace the data objects with local ones if they do not work in your system
Entries in RED may be hard coded for ease of entry by users
Entries in BLUE are usually not available to hard code…however longer fields may be added if needed.

f. VAL-10-0386-SCH APPT- The dialog text looks like this:
```
Veteran has an appointment scheduled on {FLD:DATE & TIME (REQ)}
with:\\

Provider: {FLD:TEXT (1-60 CHAR)R}                       \\
Address:  {FLD:TEXT (1-60 CHAR)R}          \\
City:     {FLD:TEXT (1-60 CHAR)R}                          \\
State:    {FLD:TEXT (1-60 CHAR)R}                          \\
Zip:      {FLD:TEXT (1-60 CHAR)R}                          \\

Phone Number: {FLD:TEXT (1-60 CHAR)R}
\\
Fax Number:   {FLD:TEXT (1-60 CHAR)1}
```

Entries in BLUE are usually not available to hard code…however longer fields may be added if needed.

NOTE: If you require further technical assistance, if there are any questions or problems during the installation, please notify your local IT support to log a national help desk ticket or contact the VA Service Desk and have them submit a national ticket to:
Category: Enterprise Applications
Subcategory: Applications
Enterprise Application: VistA - Clinical Reminders
Assignment Group: NTL SUP Clin 2