



# **Recall Reminder Technical & Security Guide**

## **PIMS V. 5.3 Scheduling Module**

### **Patch SD\*5.3\*574**

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# Revision History

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<b>Date</b>	<b>Description (Patch # if applic.)</b>	<b>Project Manager</b>	<b>Technical Writer</b>
5/24/13	Patch SD*5.3*574	Ross Vilella	Robert Sutton
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## Revision History

# Table of Contents

<b>Introduction</b> .....	<b>1</b>
<b>Implementation and Maintenance</b> .....	<b>3</b>
Prior to Installation .....	3
Namespace Conventions .....	4
Obsolete Options.....	4
Site Parameters.....	5
Conversion from Class III to Class I.....	7
<b>Files</b> .....	<b>9</b>
File List .....	9
Template List .....	9
<b>Routines</b> .....	<b>11</b>
Routine List with Descriptions .....	11
<b>Exported Options</b> .....	<b>13</b>
Exported Security Keys .....	19
<b>External/Internal Relations</b> .....	<b>21</b>
External Relations .....	21
Integration References .....	21
Internal Relations .....	22
<b>Callable Routines/Entry Points/Application Programmer Interfaces</b> .....	<b>23</b>
<b>Mail Groups/Protocols</b> .....	<b>25</b>
Mail Groups .....	25
Protocols .....	25
<b>Non-Applicable Components</b> .....	<b>27</b>
Archiving .....	27
Cross-References .....	27
External Interfaces .....	27
Global Variables .....	27
Glossary .....	27



# Introduction

The Recall Reminder software is designed to allow facilities to implement recall scheduling. The software creates a 'holding' area for patients who will need to return to a clinic in the future. This time period has been determined to be a visit greater than 90 to 120 days in the future. At the discretion of the provider, individual patients may be scheduled further into the future. Patients are entered into the software for the date they are to return. Recall Reminder parameters are set by each site to determine the number of days prior to the recall date the notification cards or letters should be printed. The card or letter will instruct the patient to contact the VA to schedule an appointment which will not be made in the VistA Scheduling system until the patient contacts their facility.

It is recommended that sites give consideration to the best way to implement Recall Reminder at their site in that doing so takes a significant amount of time to train staff and educate veterans. Sites may choose to bring up different areas; for example, dental clinics, primary care, surgical clinics, etc., one at a time, moving on to the next area after successful implementation of the previous area.

This software was first intended for Primary Care use but now is being used in many clinical areas. Multiple Recall Reminder entries can be created for one patient. The software allows a user to enter/edit Recall Reminders by using either a standalone option or Appointment Management. Additionally, the software includes the ability to establish divisions (not to be confused with Medical Center Divisions) as well as teams to assist in greater manageability of the program. Please see the User Guide for additional information regarding setting up divisions when setting up site parameters.

The software also includes a number of reports to identify patients who haven't scheduled their appointment as well as reports that will assist sites in the management of Recall Reminder.

The option Recall List Delinquencies [SDRR RECALL DELINQUENCIES] is a valuable tool that must be run on a regular basis to identify patients who have been sent Recall Reminders but have not called the facility to schedule an appointment.





# Implementation and Maintenance

## **Prior to Installation**

Before using Recall Reminder, sites will need to decide if they want to start immediately or pick a future date. Either way a start date must be chosen.

In the implementation of Recall Reminder, existing patient appointments for a clinic that will be using Recall Reminder must NOT be cancelled. Future appointments that have already been scheduled must be allowed to take place unless they are cancelled or rescheduled at the patient's request. Clinic setups will need to be adjusted so no appointments can be scheduled more than 90 to 120 days into the future once the start date has been reached.

**Note:** At the discretion of the provider, individual patients may be given appointments further into the future.

### Choose to Begin Immediately

#### *Advantages*

- Sites can immediately begin Recall Reminder on their start date.

#### *Disadvantages*

- Extra work in setting up clinic area using Recall Reminder.
- New procedure can be confusing and sites should be prepared for it.

### Choose to Begin at a Later Date

#### *Advantages*

- More time and opportunity for patient and staff education.

#### *Disadvantages*

- Can be confusing for staff to have existing appointments.

**One very important word of advice** – Choose a start date at least several months in the future and EDUCATE, ADVERTISE, and PUBLICIZE CHANGES to all staff and patients.

## Namespace Conventions

The namespace assigned to the Recall Reminder software is SDRR.

## Obsolete Options

The Recall Reminder software is a replacement for a Class III application called Clinic Recall which has a namespace of AXVC (older versions have a namespace of A687).

The following options (if your site has them) should be placed Out Of Order with a statement of “Replaced with Class I”. This should only be done once all conversions of the older Clinic Recall files have been successfully completed.

### AXVC Options

Clinic Recall Menu Option [**AXVCLR CLINIC RECALL MENU**]  
Print Clinic Recall Cards by Div [**AXVCLR RECALL PR CARD BY DIV**]  
Print Clinic Recall Cards by Clinic [**AXVCLR RECALL PR CARD BY CLINIC**]  
Print Clinic Recall Cards by Prov [**AXVCLR RECALL PRINT CARD**]  
Print Clinic Recall Cards by Team [**AXVCLR RECALL PR CARD BY TM**]  
Add/Edit Clinic Recall Patient [**AXVCLR RECALL CARD ADD**]  
Edit/Add Clinic Recall Provider [**AXVCLR ADD RECALL PROVIDER**]  
Edit/Add Recall Teams [**AXVCLR ADD RECALL TEAM**]  
Inquire to Patient Recall [**AXVCLR RECALL CARD INQ**]  
Recall List Print [**AXVCLR RECALL PRINT REPORT**]

### A687 Options

Print Clinic Recall Cards [**A687 RECALL PRINT CARD**]  
Add/Edit Clinic Recall Patient [**A687 RECALL CARD ADD**]  
Edit/Add Clinic Recall Provider [**A687 ADD RECALL PROVIDER**]  
Inquire to Patient Recall [**A687 RECALL CARD INQ**]  
Recall List Print [**A687 RECALL PRINT REPORT**]

You may have these two additional options which will need to be placed out of order.

Clinic Recall Menu [**A687 CLINIC RECALL MENU**]  
Print 2 Sided Clinic Recall Cards [**A687 RECALL PRINT CARD2**]

### Conversion Options

The following options have been placed Out Of Order with SD\*5.3\*574 since all conversions of the Class III Outpatient Clinic Recall files should have been successfully completed.

Conversion Menu [**SDRR IRM MENU**]  
Convert **OUTPATIENT CLINIC RECALL PARAM**  
Convert **OUTPATIENT CLINIC RECALL APPT TYPES**  
Convert **OUTPATIENT CLINIC RECALL TEAM**

Convert **OUTPATIENT CLINIC RECALL PROVIDERS**  
 Convert **OUTPATIENT CLINIC RECALL**

### Site Parameters

There are several parameters associated with the Recall Reminder software that are site configurable. These parameters are to be set using options on the Manager menu for Recall Reminder [SDRR MANAGER MENU] which is locked with security key SDRR MANAGER.

The following is an example of the options used to set up Recall Reminder. For sites that have any version of Clinic Recall using the AXVC namespace, there are conversion options that will move the Class III file information into the national files. Please keep in mind if you are using an older version of Clinic Recall and have made local changes to those files, these changes will not be transferred over. Examples of the options used to convert the file entries are displayed later in this section.

**Note:** The conversion options have been placed Out of Order with SD\*5.3\*574, since all conversions of the Class III Outpatient Clinic Recall files should have been successfully completed.

The options used for the implementation of Recall Reminder are as follows.

Edit/Add Clinic Recall Provider [SDRR ADD RECALL PROVIDER]  
 Edit/Add Recall Teams [SDRR ADD RECALL TEAM]  
 Enter/Edit Appt Types [SDRR APPT TYPE]  
 Enter/Edit Clinic Letters [SDRR CLINIC LETTER]  
 Enter/Edit Clinic Recall Site Params [SDRR RECALL REMINDER PARAMS]

The options listed above should be performed in the following order.

#### 1. Enter/Edit Clinic Recall Site Params [SDRR RECALL REMINDER PARAMS]

```
Select RECALL REMINDERS PARAMETERS DIVISION NAME: TEST LETTER
  Are you adding 'TEST LETTER' as a new RECALL REMINDERS PARAMETERS (the
  8TH)? No// Y (Yes)
DIVISION NAME: TEST LETTER//
**Your Site can only select either CARDS or LETTERS**
TYPE OF NOTIFICATION: LETTERS// ?
  Choose from:
      L          LETTERS
      C          CARDS
TYPE OF NOTIFICATION: LETTERS//
AUTO PRINT DAYS:
(Enter the number of days prior to the recall date the notification cards/letters should be printed.)
CLEAN UP DAY SETTING:
(There is a tasked job that will check to see if a patient has made an appointment and, if so, will
remove the patient from the RECALL REMINDERS file (#403.5). This entry indicates the
number of days before and after the requested appointment date the job will look at.)
```

**NOTE:** Entry at the DIVISION prompt is not an entry from the MEDICAL CENTER DIVISION file (#40.8). The parameter settings allow sites to set up “divisions” or “groupings” for easier manageability of different areas of the facility.

## 2. Edit/Add Recall Teams [SDRR ADD RECALL TEAM]

Select Recall Reminder Team: PINKY TEAM  
NAME: PINKY TEAM//  
ACTIVE/INACTIVE: ACTIVE//  
PRINTER ASSIGN: PRINTER1//  
(Select the printer where notification cards/letters will be printed.)  
CLINIC RECALL PARAM: TEST LETTER//  
(Select the correct Recall Param division.)

## 3. Edit/Add Clinic Recall Provider [SDRR ADD RECALL PROVIDER]

Select RECALL REMINDERS PROVIDERS: TEST, ANOTHER TA IRM  
Are you adding 'TEST, ANOTHER' as a new RECALL REMINDERS PROVIDERS (the 45TH)? No// Y (Yes)  
RECALL REMINDERS PROVIDERS TEAM: PINKY TEAM  
RECALL REMINDERS PROVIDERS STATUS: A ACTIVE  
PROVIDER: TEST, ANOTHER//  
TEAM: PINKY TEAM//  
DIVISION:  
(Select the Medical Center Division this provider is assigned to.)  
DIRECT PHONE: XXX-XXX-XXXX  
EXT. :  
STATUS: ACTIVE//  
KEY:  
(May be used to control editing or canceling of Recall Reminders for this provider.)

## 4. Enter/Edit Appt Types [SDRR APPT TYPE]

Select RECALL REMINDERS APPT TYPE NAME: followup  
NAME: FOLLOWUP//  
SYNONYM: F//  
(This is what displays on the CPRS cover sheet.)

## 5. Enter/Edit Clinic Letters [SDRR CLINIC LETTER]

Select RECALL REMINDERS LETTERS CLINIC: 1 TRI-CITIES AFTERCARE GROUP  
Are you adding 'TRI-CITIES AFTERCARE GROUP' as a new RECALL REMINDERS LETTERS (the 2ND)? No// y (Yes)  
CLINIC: TRI-CITIES AFTERCARE GROUP//  
LETTER TEXT:  
No existing text  
Edit? NO//

## Conversion from Class III to Class I

The following options have been placed Out Of Order with SD\*5.3\*574 since all conversions of the Class III Outpatient Clinic Recall files should have been successfully completed.

Conversion Menu [SDRR IRM MENU]  
 Convert **OUTPATIENT CLINIC RECALL PARAM**  
 Convert **OUTPATIENT CLINIC RECALL APPT TYPES**  
 Convert **OUTPATIENT CLINIC RECALL TEAM**  
 Convert **OUTPATIENT CLINIC RECALL PROVIDERS**  
 Convert **OUTPATIENT CLINIC RECALL**

For any site using an older version of Clinic Recall with an AXVC namespace, options are available for converting Class III files to national Class I files.

The Conversion Menu [SDRR IRM MENU], containing the following options, can be used to move entries within Class III files to national Class I files. This menu is locked with the XUPROG security key.

**These options must be performed in the order shown below. After each option is run, an e-mail will be sent to the programmer who ran the option giving information about how many entries were moved over. Once the e-mail has been read (and only after the e-mail has been read) run the next option.**

- 1 Convert OUTPATIENT CLINIC RECALL PARAM [SDRR CONVERSION PARAMS FILE]
- 2 Convert OUTPATIENT CLINIC RECALL APPT TYPES [SDRR CON RECALL APPT TYPES]
- 3 Convert OUTPATIENT CLINIC RECALL TEAM [SDRR CONVERSION TEAM FILE]
- 4 Convert OUTPATIENT CLINIC RECALL PROVIDERS [SDRR CONVERSION PROVIDER FILE]
- 5 Convert OUTPATIENT CLINIC RECALL [SDRR CONV OUTPATIENT RECALL]

### *Conversion E-mail Example 1*

```
Subj: SD*5.3*536 OUTPATIENT CLINIC TEAM FILE CONVERSION REPORT  [#8871853]
03/11/08@07:52
22 lines
From: POSTMASTER In 'WASTE' basket. Page 1
```

```
-----
Patch: SD*5.3*536 RECALL REMINDER TEAM FILE CONVERSION PROCESSING
*****
```

```
The existing Class III file called OUPATIENT CLINIC RECALL TEAM (190004),
which contains Clinic Recall Team Names have been converted to a new Class I
file called Recall Reminder Team (403.55) which will provide the same
functionality.
*****
```

```
SUMMARY OF PROCESSING RESULTS:
```

```
=====
<<< The Class III OUPATIENT CLINIC RECALL TEAM File Conversion has
Completed. >>>
```

## Implementation and Maintenance

DATE/TIME TASK STARTED: Mar 11, 2008 7:52:26 am  
DATE/TIME TASK COMPLETED: Mar 11, 2008 7:52:26 am

TOTAL RECORDS CONVERTED: 17  
<END OF REPORT>

### *Conversion E-mail Example 2*

Subj: SD\*5.3\*536 OUTPATIENT CLINIC RECALL FILE CONVERSION REPORT [#8871904]  
03/14/08@07:44 24 lines  
From: POSTMASTER In 'WASTE' basket. Page 1

-----  
Patch: SD\*5.3\*536 RECALL REMINDER FILE CONVERSION PROCESSING

\*\*\*\*\*

The existing Class III file called OUTPATIENT CLINIC RECALL (687065), which contains Clinic Recall ENTRIES have been converted to a new Class I file called Recall Reminder (403.5) which will provide the same functionality. If you have added any local site field to file 687065 they will not be moved over.

\*\*\*\*\*

SUMMARY OF PROCESSING RESULTS:

=====

<<< The Class III OUTPATIENT CLINIC RECALL PATIENT File Conversion has Completed. >>>

DATE/TIME TASK STARTED: Mar 14, 2008 7:43:24 am  
DATE/TIME TASK COMPLETED: Mar 14, 2008 7:44:24 am  
DATE/TIME LAST RUN: Mar 11, 2008 11:20:48 am

TOTAL RECORDS CONVERTED: 10645  
<END OF REPORT>

# Files

## File List

<u>FILE #</u>	<u>FILE NAME</u>	<u>GLOBAL</u>
403.5	RECALL REMINDERS	^SD(403.5
403.51	RECALL REMINDERS APPT TYPE	^SD(403.51
403.52	RECALL REMINDERS LETTERS	^SD(403.52
403.53	RECALL REMINDERS PARAMETERS	^SD(403.53
403.54	RECALL REMINDERS PROVIDERS	^SD(403.54
403.55	RECALL REMINDERS TEAM	^SD(403.55
403.56	RECALL REMINDERS REMOVED	^SD(403.56

## Template List

<u>FILE #</u>	<u>TEMPLATE NAME</u>	<u>DESCRIPTION</u>
#403.5	SDRREMARKS	Allows for more comments when edit/delete Recall
#403.5	SDRR RECALL CARD ADD	Used to add Recall outside of Appointment Management
#403.51	SDRR APPT TYPE	Add/Edit Recall Appointment Types
#403.52	SDRR ADD LETTERS	Enter Recall Letters
#403.53	SDRR PARAMS ENTER	Add/Edit Recall Parameters
#403.54	SDRR ADD PROVIDER	Add/Edit Recall Provider
#403.55	SDRR TEAM NAMES	Add/Edit Recall Teams





# Routines

## Routine List with Descriptions

The following is a listing of the Recall Reminder routines with a brief description of each.

### *SD\*5.3\*536*

SDRR1	SDRRCLR Event protocol
SDRR5	Remove and replace providers and clinics
SDRRC15	Post-Install for Patch SD*5.3*536 Convert Team File
SDRRC16	Env/Post-Install for Patch SD*5.3*536 Convert Params File
SDRRC17	Env/Post-Install for Patch SD*5.3*536 Convert Appt Types
SDRRC18	Env/Post-Install for Patch SD*5.3*536 Convert Providers
SDRRC20	Env/Post-Install for Patch SD*5.3*536 Convert Recall Patient File
SDRRCLR	Reminder Recall clean-up
SDRRCLR2	Stand alone Recall enter/edit
SDRRCRR, SDRRCRR1, SDRRCRRP	Clinic Recall list report
SDRRDEL	Delete/edit Recall Reminders
SDRRINQ, SDRRINQ1	Recall patient inquiry
SDRRISB	Recall utility routine for printing
SDRRISRA	Scheduled Recall Appointments
SDRRISRD	Recall List Delinquencies
SDRRISRL	Recall List w/Available Slots
SDRRISRU	Recall Reminder Utilities
SDRRISRX	Recall List Clerk Deletions
SDRRLRP	Entry routine for manual printing of letters or cards
SDRROR	Called within ORWCV routine
SDRRPXC	Recall Reminder utilities
SDRRRECL	Printing of letters manually
SDRRRECP	Manual printing of cards
SDRRSEG3	Called within DGRPD for patient inquiry - (Activated with future patch)
SDRRSLC1	Manual printing of letters
SDRRSLCT	Recall Reminder - Generic file entry selector
SDRRTSK, SDRRTSKI	Nightly job for printing letters or cards
SDRRUTL, SDRRUTL1	Sort utility for printing of reports

### *OR\*3.0\*302*

ORWCV	Display of Recall Entries on CPRS Coversheet
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# Exported Options

There are 26 new options exported with Recall Reminders V. 1.0.

NAME: SDRR ADD RECALL PROVIDER  
MENU TEXT: Edit/Add Clinic Recall Provider  
TYPE: edit  
PACKAGE: SCHEDULING  
E ACTION PRESENT: YES                      X ACTION PRESENT: YES  
DESCRIPTION: This option will allow for enter/edit of Recall Reminder Providers.  
EXIT ACTION: K DLAYGO              ENTRY ACTION: S DLAYGO=403.54  
DIC {DIC}: SD(403.54,              DIC(0): AEMQL  
DIE: SD(403.54,              DR {DIE}: [SDRR ADD PROVIDER]  
UPPERCASE MENU TEXT: EDIT/ADD CLINIC RECALL PROVIDE

NAME: SDRR ADD RECALL TEAM  
MENU TEXT: Edit/Add Recall Teams  
TYPE: edit  
PACKAGE: SCHEDULING  
E ACTION PRESENT: YES                      X ACTION PRESENT: YES  
DESCRIPTION: Will be used to add or edit team names for the Recall Reminder software.  
EXIT ACTION: K DLAYGO              ENTRY ACTION: S DLAYGO=403.55  
DIC {DIC}: SD(403.55,              DIC(0): AEMQL  
DIC(A): Select Recall Reminder Team:  
DIE: SD(403.55,              DR {DIE}: [SDRR TEAM NAMES]  
UPPERCASE MENU TEXT: EDIT/ADD RECALL TEAMS

NAME: SDRR APPT TYPE  
MENU TEXT: Enter/Edit Appt Types  
TYPE: edit  
PACKAGE: SCHEDULING  
E ACTION PRESENT: YES  
DESCRIPTION: Recall Appt types are used in viewing recall information on CPRS cover sheet. This information also shows during Recall Patient Inquiry and on reports. DELETION OF ENTRIES IS NOT ALLOWED.  
ENTRY ACTION: S DLAYGO=403.51              DIC {DIC}: SD(403.51,  
DIC(0): AEMQL                      DIE: SD(403.51,  
DR {DIE}: [SDRR APPT TYPE]  
UPPERCASE MENU TEXT: ENTER/EDIT APPT TYPES

NAME: SDRR CARD ADD  
MENU TEXT: Add/Edit Clinic Recall Patient  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: This option allows users to enter or edit a patient into the Recall Reminder file without using Appointment Management.  
ROUTINE: SDRRCLR2  
UPPERCASE MENU TEXT: ADD/EDIT CLINIC RECALL PATIENT

## Exported Options

NAME: SDRR CLEAN-UP  
MENU TEXT: Clean Up Clinic Recall Entries  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: This option is a Recall Reminder option which should be queued to run after 10:00pm every night. It will check those patients in Recall Reminder against scheduled appointments and will delete a patient from Recall Reminder if the scheduled appointment date and clinic are within a number of days from the Recall Date. The Recall clinic must match the clinic that the patient has been scheduled for. If the clinic name is different, it will not delete the patient from the Recall Reminders file. The number of days is set within RECALL REMINDERS  
PARAMETERS.  
ROUTINE: SDRRCLR  
SCHEDULING RECOMMENDED: YES  
UPPERCASE MENU TEXT: CLEAN UP CLINIC RECALL ENTRIES

NAME: SDRR CLINIC LETTER  
MENU TEXT: Enter/Edit Clinic Letters  
TYPE: edit  
PACKAGE: SCHEDULING  
E ACTION PRESENT: YES                    X ACTION PRESENT: YES  
DESCRIPTION: If you have setup a Clinic Recall entry with the Letter type as notification, you will need to enter the letter text using this option. You can refer to the clinic within the text or enter generic text format.  
EXIT ACTION: K DLAYGO            ENTRY ACTION: S DLAYGO=403.52  
DIC {DIC}: SD(403.52,            DIC(0): AEMQL  
DIE: SD(403.52,            DR {DIE}: [SDRR ADD LETTERS]  
UPPERCASE MENU TEXT: ENTER/EDIT CLINIC LETTERS

NAME: SDRR CONVERT ENTRIES  
MENU TEXT: Convert Retired Providers/Clinic Recalls  
TYPE: run routine  
PACKAGE: SCHEDULING  
LOCK: SDRR MANAGER  
DESCRIPTION: This option will allow an approved user to convert Recall providers and clinics. If a provider leaves and there are Clinic Recalls already scheduled, you can convert these recalls to the new provider.  
ROUTINE: SDRR5  
UPPERCASE MENU TEXT: CONVERT RETIRED PROVIDERS/CLIN

NAME: SDRR DELETE RECALL  
MENU TEXT: Delete/Cancel Clinic Recall Entry  
TYPE: run routine  
PACKAGE: SCHEDULING  
E ACTION PRESENT: YES  
DESCRIPTION: This option allows Recall Reminder entries to be cancelled or deleted.  
ENTRY ACTION: S DIDEL=403.5  
ROUTINE: SDRRDEL  
DIC {DIC}: SD(403.5            DIC(0): AEMQ  
UPPERCASE MENU TEXT: DELETE/CANCEL CLINIC RECALL EN

NAME: SDRR MANAGER MENU  
 MENU TEXT: Manager menu for Recall Reminder  
 TYPE: menu  
 PACKAGE: SCHEDULING  
 LOCK: SDRR MANAGER  
 DESCRIPTION: This menu will be locked with SDRR MANAGER key. This menu will house all options for setting up Recall Reminder.  
 ITEM: SDRR CONVERT ENTRIES                      SYNONYM: 1  
     DISPLAY ORDER: 1  
 ITEM: SDRR ADD RECALL TEAM                      SYNONYM: 3  
     DISPLAY ORDER: 3  
 ITEM: SDRR ADD RECALL PROVIDER                SYNONYM: 5  
     DISPLAY ORDER: 5  
 ITEM: SDRR CLINIC LETTER                        SYNONYM: 6  
     DISPLAY ORDER: 6  
 ITEM: SDRR APPT TYPE                            SYNONYM: 4  
     DISPLAY ORDER: 4  
 ITEM: SDRR RECALL REMINDER PARAMS        SYNONYM: 2  
     DISPLAY ORDER: 2  
 UPPERCASE MENU TEXT: MANAGER MENU FOR RECALL REMIND

NAME: SDRR PATIENT INQUIRY  
 MENU TEXT: Recall Patient Inquiry  
 TYPE: run routine  
 PACKAGE: SCHEDULING  
 E ACTION PRESENT: YES  
 DESCRIPTION: Allows for range or full patient inquiry.  
 ENTRY ACTION: K DIC  
 ROUTINE: EN^SDRRINQ  
 UPPERCASE MENU TEXT: RECALL PATIENT INQUIRY

NAME: SDRR PATIENT LIST  
 MENU TEXT: Recall List Print  
 TYPE: run routine  
 PACKAGE: SCHEDULING  
 DESCRIPTION: This menu allows users to print Recall Reminders by division, clinic, or Recall Reminder teams. It will ask for a date range and must be queued to a printer.  
 ROUTINE: SDRRCRR  
 UPPERCASE MENU TEXT: RECALL LIST PRINT

NAME: SDRR PRINT MENU  
 MENU TEXT: Clinic Recall Print Menu  
 TYPE: run routine  
 PACKAGE: SCHEDULING  
 LOCK: SDRR MANAGER  
 DESCRIPTION: This menu allows users to print either Recall Letters or Cards for patients who have been entered into the Recall Reminders file.  
 ROUTINE: SDRRLRP  
 UPPERCASE MENU TEXT: CLINIC RECALL PRINT MENU

## Exported Options

NAME: SDRR RECALL APPOINTMENTS  
MENU TEXT: Scheduled Recall Appointments  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: This option lists the patient appointments which caused patients to drop off the Recall List.  
ROUTINE: EN^SDRRISRA  
UPPERCASE MENU TEXT: SCHEDULED RECALL APPOINTMENTS

NAME: SDRR RECALL DELETIONS  
MENU TEXT: Recall List Deletions  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: This option reports on the patients who were deleted from the Recall List by a clerk.  
ROUTINE: EN^SDRRISRX  
UPPERCASE MENU TEXT: RECALL LIST DELETIONS

NAME: SDRR RECALL DELINQUENCIES  
MENU TEXT: Recall List Delinquencies  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: This option is essentially the same report as those produced by the two "Delinquent Recall" reports except it provides better control of clinic selection, and it reports on how many days delinquent each patient is. The user is asked for the recall date range, a set of clinics, and whether the report should break on clinic. It reports on patients who have been sent recall reminders, but haven't yet called to schedule an appointment.  
ROUTINE: EN^SDRRISRDR  
UPPERCASE MENU TEXT: RECALL LIST DELINQUENCIES

NAME: SDRR RECALL LIST  
MENU TEXT: Recall List w/Available Slots  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: This option is essentially the same report as that produced by the "Recall List Print" [SDRR PATIENT LIST] except it also reports on slot availability by month for each clinic. The user is asked for a date range, a set of clinics, and whether the report should page break on clinic. It reports on patients who are on the RECALL LIST.  
ROUTINE: EN^SDRRISRRL  
UPPERCASE MENU TEXT: RECALL LIST W/AVAILABLE SLOTS

NAME: SDRR RECALL MAIN MENU  
MENU TEXT: Recall Reminder Main Menu  
TYPE: menu  
PACKAGE: SCHEDULING  
DESCRIPTION: Main menu for all Recall Reminder options. Some of the options are locked with SDRR MANAGER security key and should be assigned to the Recall Reminder coordinator.

ITEM: SDRR DELETE RECALL	SYNONYM: 1
DISPLAY ORDER: 1	
ITEM: SDRR CARD ADD	SYNONYM: 2
DISPLAY ORDER: 2	
ITEM: SDRR RECALL DELINQUENCIES	SYNONYM: 3
DISPLAY ORDER: 3	
ITEM: SDRR RECALL DELETIONS	SYNONYM: 4
DISPLAY ORDER: 4	

ITEM: SDRR RECALL APPOINTMENTS           SYNONYM: 5  
 DISPLAY ORDER: 5  
 ITEM: SDRR RECALL LIST                   SYNONYM: 6  
 DISPLAY ORDER: 6  
 ITEM: SDRR PRINT MENU                   SYNONYM: 8  
 DISPLAY ORDER: 8  
 ITEM: SDRR PATIENT INQUIRY           SYNONYM: 9  
 DISPLAY ORDER: 9  
 ITEM: SDRR MANAGER MENU               SYNONYM: 10  
 DISPLAY ORDER: 10  
 ITEM: SDRR PATIENT LIST               SYNONYM: 7  
 DISPLAY ORDER: 7  
 UPPERCASE MENU TEXT: RECALL REMINDER MAIN MENU

NAME: SDRR RECALL REMINDER PARAMS  
 MENU TEXT: Enter/Edit Clinic Recall Site Params  
 TYPE: edit  
 PACKAGE: SCHEDULING  
 E ACTION PRESENT: YES  
 X ACTION PRESENT: YES  
 DESCRIPTION: This option will allow a site to set up the Recall Reminder software.  
 EXIT ACTION: K DLAYGO  
 ENTRY ACTION: S DLAYGO=403.53  
 DIC {DIC}: SD(403.53,                   DIC(0): AEMQL  
 DIE: SD(403.53,                       DR {DIE}: [SDRR PARAMS ENTER]  
 UPPERCASE MENU TEXT: ENTER/EDIT CLINIC RECALL SITE

NAME: SDRR TASK JOB  
 MENU TEXT: Auto Print for Recall Reminder  
 TYPE: run routine  
 PACKAGE: SCHEDULING  
 DESCRIPTION: This option should be queued to print every night. It does not need to be queued to a device.  
 ROUTINE: SDRRTSK  
 SCHEDULING RECOMMENDED: YES  
 UPPERCASE MENU TEXT: AUTO PRINT FOR RECALL REMINDER  
**(When scheduling this job there is NO need to enter DEVICE FOR QUEUED JOB OUTPUT. This is determined by the printer name entered when setting up Recall Teams. ONLY printers that print 12 pitch should be selected for printing letters.)**

NAME: SDRR TASK JOB CARD  
 MENU TEXT: Auto Print for Recall Reminder Cards  
 TYPE: run routine  
 DESCRIPTION: This option should be queued to print every night if your facility will be using Recall cards. It does not need to be queued to a device.  
 ROUTINE: SDRRTSK1  
 UPPERCASE MENU TEXT: AUTO PRINT FOR RECALL REMINDER

## Exported Options

The following options have been placed Out Of Order with SD\*5.3\*574 since all conversions of the Class III Outpatient Clinic Recall files should have been successfully completed.

NAME: SDRR CON RECALL APPT TYPES  
MENU TEXT: Convert OUTPATIENT CLINIC RECALL APPT TYPES  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: Convert OUTPATIENT CLINIC RECALL APPT TYPES to RECALL REMINDERS APPT TYPE.  
ROUTINE: ENV^SDRRC17  
UPPERCASE MENU TEXT: CONVERT OUTPATIENT CLINIC RECA

NAME: SDRR CONV OUTPATIENT RECALL  
MENU TEXT: Convert OUTPATIENT CLINIC RECALL  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: Convert OUTPATIENT CLINIC RECALL to RECALL REMINDERS file.  
ROUTINE: ENV^SDRRC20  
UPPERCASE MENU TEXT: CONVERT OUTPATIENT CLINIC RECA

NAME: SDRR CONVERSION PARAMS FILE  
MENU TEXT: Convert OUTPATIENT CLINIC RECALL PARAM  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: If there is an OUTPATIENT CLINIC RECALL PARAM file, will convert to RECALL REMINDERS PARAMETERS.  
ROUTINE: ENV^SDRRC16  
UPPERCASE MENU TEXT: CONVERT OUTPATIENT CLINIC RECA

NAME: SDRR CONVERSION PROVIDER FILE  
MENU TEXT: Convert OUTPATIENT CLINIC RECALL PROVIDERS  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: Convert OUTPATIENT CLINIC RECALL PROVIDERS to RECALL REMINDERS PROVIDERS file.  
ROUTINE: ENV^SDRRC18  
UPPERCASE MENU TEXT: CONVERT OUTPATIENT CLINIC RECA

NAME: SDRR CONVERSION TEAM FILE  
MENU TEXT: Convert OUTPATIENT CLINIC RECALL TEAM  
TYPE: run routine  
PACKAGE: SCHEDULING  
DESCRIPTION: Convert OUTPATIENT CLINIC RECALL TEAM to RECALL REMINDERS TEAM.  
ROUTINE: ENV^SDRRC15  
UPPERCASE MENU TEXT: CONVERT OUTPATIENT CLINIC RECA



NAME: SDRR IRM MENU  
 MENU TEXT: Conversion Menu  
 TYPE: menu  
 LOCK: XUPROG  
 PACKAGE: SCHEDULING  
 DESCRIPTION: This menu has all items for converting older versions of Clinic Recall into the national version of Recall Reminder. Options should only be run once then put out of order.  
 ITEM: SDRR CONVERSION PARAMS FILE      SYNONYM: 1  
     DISPLAY ORDER: 1  
 ITEM: SDRR CON RECALL APPT TYPES      SYNONYM: 2  
     DISPLAY ORDER: 2  
 ITEM: SDRR CONVERSION TEAM FILE      SYNONYM: 3  
     DISPLAY ORDER: 3  
 ITEM: SDRR CONVERSION PROVIDER FILE      SYNONYM: 4  
     DISPLAY ORDER: 4  
 ITEM: SDRR CONV OUTPATIENT RECALL      SYNONYM: 5  
     DISPLAY ORDER: 5  
 UPPERCASE MENU TEXT: CONVERSION MENU

### **Exported Security Keys**

There is one security key, SDRR MANAGER, exported with SD\_5\_3\_P536. This key should be assigned to the Scheduling application coordinator. This key will lock SDRR MANAGER MENU and SDRR PRINT MENU.



# External/Internal Relations

## External Relations

OR\*3\*302 brings in the ability to view Recall Reminders within the appointment information on a patient's cover sheet in CPRS. Patch OR\*3\*302 is part of the SD\_5\_3\_P536 HFS file. Changes were made to routine ORWCV.

This software will function at both Medical Centers or Outpatient clinics and CBOCs. It works along with outpatient Appointment Manager.

This product is based on VistA Systems running the following versions of the software listed below.

1. VA FileMan V. 22 or greater
2. Kernel V. 8.0 or greater
3. Kernel Toolkit V. 7.3 or greater
4. Kernel RPC Broker V. 1.1 or greater
5. PIMS (Patient Information Management System) V. 5.3 or greater (including):
  - a. Registration V. 5.3
  - b. Scheduling V. 5.3
6. Order Entry V. 3.0 (CPRS (Computerized Patient Record System) V. 1.0 (GUI V. 27.77)) or greater

## Integration References

There is one Integration reference - Recall Reminder Change to ORWCV (#5195).

```
5195      NAME: Recall Reminder Change to ORWCV
CUSTODIAL PACKAGE: SCHEDULING
SUBSCRIBING PACKAGE: ORDER ENTRY/RESULTS REPORTING
                RECALL REMINDER MODULE
                USAGE: Private          ENTERED: MAY 7,2008
                STATUS: Active          EXPIRES:
                DURATION: Till Otherwise Agr  VERSION:
DESCRIPTION:                TYPE: Routine
These changes are required to show Recall Reminder information on the
Cover sheet for all CPRS users. This is a view only NO input done.

ORWCV.INT VST+22          ;***ADD CHANGES TO CALL COVER^SDRROR VST+23
D COVER^SDRROR DTLVST+14  I $P(APPTINFO,";")="R" D RCDTL^SDRROR

making two calls to SDRROR

SDRR is a new namespace being used to move a Class III application
(Clinic Recall) to a National Class I application called Reminder Recall
(SDRR NAMESPACE).
```

## External/Internal Relations

ROUTINE: ORWCV  
COMPONENT: SDRROR  
VARIABLES: Used BEG  
VARIABLES: Used END  
VARIABLES: Used DFN  
KEYWORDS: RECALL

## Internal Relations

There are no internal relationships with this product.

# Callable Routines/Entry Points/Application Programmer Interfaces

**SDRROR** Extracts data from RECALL REMINDERS (#403.5) file based on the criteria specified in the DFN input parameter. The data will be returned in a local array.

Input:

DFN The internal entry number in the Patient file for the patient whose Recall Reminder data needs to be extracted.



# Mail Groups/Protocols

## **Mail Groups**

### **SDRR BAD ADDRESS**

This mail group will receive messages for patients who have been scheduled in Recall Reminder but have a bad address flag set.

## **Protocols**

### **SDRR EVENT Recall Reminder Action**

This protocol will hang off the SDAM menu and is used for the RECALL REMINDER project. It will allow users to enter/edit information that has been stored in the RECALL REMINDERS file.





# Non-Applicable Components

## **Archiving**

There is no archiving functionality.

## **Cross-References**

There are no non-standard cross-references exported with SD\_5\_3\_P536.KID.

## **External Interfaces**

External Interfaces is not applicable.

## **Global Variables**

There are no non-standard or global variables.

## **Glossary**

Glossary is not applicable.