Primary Care Management Module (PCMM)

User Manual

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Department of Veterans Affairs
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Revision History

Initiated on 12/23/2004

Date	Description (Patch # if applicable.)	Project Manager	Technical Writer
12/23/2004	Manual updated to comply with SOP 192-352 Displaying Sensitive Data	Tom Colton	Berry Anderson
12/11/2006	Manual updated to reflect additional functionality introduced with Patch SD*5.3*297	Bonnie Brown	Berry Anderson
08/08/2007	Manual updated to show changes with Patch SD*5.3*483 – 508 Compliant Graphical User Interface (GUI)	Bonnie Brown	Berry Anderson
08/13/2007	Manual updated to show changes with Patch SD*5.3*498	Bonnie Brown	Berry Anderson
09/26/2007	Manual updated to show changes with Patch SD*5.3*515 – Added Non Primary Care Team set up for OIF OEF Case Management	Bonnie Brown	Berry Anderson
05/20/2008	Manual updated to show changes with Patch SD*5.3*499 – Modifications to PCMM NIGHTLY TASK processing.	A. Scott	T. Dawson
10/10/2008	Manual updated to show changes with Patch SD*5.3*505 – PCMM Phase III Enhancements	Richard Muller	Darryl Reese (Author) Corinne Bailey
01/15/2009	Manual updated to add elaboration 3.1 regarding transmission errors with Patch SD*5.3*534 – PCMM, PAIT and SCHEDULING FIXES.	A. Scott	T. Dawson
04/01/2009	Manual updated to reflect the SCMC CHECK FTEE RPC has been changed to return a value of 99.1 if non-numeric information is entered in the combo box.	Chris Flegel, author	Corinne Bailey
06/30/2009	Manual updated to mark /Detailed Patient Assignments – Assigned PC option obsolete with Patch SD*5.3*535 – ASSOCIATED CLINIC, ENROLLMENT PCMM FIXES.	A. Scott	T. Dawson
02/19/2010	Screen captures edited to comply with SOP 192-352, Displaying Sensitive Data	Ashwani Suri	Corinne Bailey
09/22/2011	Manual updated with changes from Patch SD*5.3*504	Don Michalak	Corinne Bailey
06/19/2012	Manual updated (p. 8-10) for change made by Patch SD*5.3*539 - ELEC WAIT LIST, PAT APPT INFO TXN, PRIM CARE MGT MOD FIXES	A. Scott	T. Dawson
07/24/2012	Manual updated with changes from Patch SD*5.3*581. It includes PCMM GUI version 1.3.0.27 (508 compliant). Added screenshot for FTEE and Panel Size Report. Added new GUI screenshots and description to Staff/FTEE Tab section. Updated Glossary with FTEE acronym and definition.	Don Michalak	Rita Muller T. Dawson
1/16/2014	Updated description of the PCMM status bar for patch SD*5.3*607.	A. Scott	R Sutton

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Introduction

Overview of the Primary Care Management Module

The Primary Care Management Module (PCMM) was developed to assist VA facilities in implementing primary care. PCMM supports both primary care and non-primary care teams. Teams are groups of staff members organized for a certain purpose. The software allows you to setup and define a team, assign positions to the team, assign staff to the positions, assign patients to the team, assign patients to practitioners, and reassign patients from one team to another team.

Tools are provided with the software to facilitate the startup process. These tools use the site's data (where available) to automate the following tasks: identify patients to be assigned to primary care; assign patients to teams; assign patients to practitioners via team positions.

As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death notifications, inpatient notifications, consult notifications, team notifications, and automatic inactivation notifications. For each category, you can elect to have a position get messages for all patients on a team, only patients associated with that team position, or not send messages. You can also elect to have the messages for each category go to the position’s preceptor. A preceptor is a position that acts as a supervisor/monitor for another position.

Numerous reports may be generated. Some of the reports are affected by site parameters. Although many of the reports may be printed through both the roll and scroll interface and the GUI (graphical user interface), most of the reports are only accessed through the roll and scroll interface. Patient-oriented outputs, practitioner-oriented outputs, and team-oriented outputs may be produced.

The *Mass Team/Position Discharge* option provides the ability to discharge large numbers of patients from a team or position at one time. This option is only available through the roll and scroll interface. A confirmation MailMan message is generated from the utilization of this option.

Primary care team/position assignment/unassignment may be accomplished through the GUI interface or through the *Primary Care Team/Posn Assign or Unassign* Scheduling option and through the *PC Assign or Unassign* action in the Appointment Management option.

Every patient must be assigned a primary care provider (PCP). A PCP can be an attending physician (MD or DO), a nurse practitioner (NP), or a physician assistant (PA).

In some instances, a patient may be seen regularly by someone who is not licensed as an independent practitioner per the Health Care Finance Agency (HCFA). For example, an Intern Physician cannot work independently as a PCP, but may be assigned as an "Associate Provider Providing Primary Care (AP/PCP)" in PCMM. When those positions are established, they must be assigned a preceptor. Once a patient assignment is made to a position with a preceptor link, you will not be able to inactivate the link without establishing another.

The PCMM business rules provide information on how some of the PCMM fields will be handled for team and team positions. These rules are not intended to be all encompassing, but to allow basic checking within the system to ensure data integrity.

508 Compliant GUI

Section 508 of the Rehabilitation Act Amendments of 1998 requires that when Federal agencies develop, procure, maintain, or use electronic and information technology, they shall ensure that the electronic and information technology allows persons with disabilities to have access to and use of information and data that is comparable to the access to and use of information and data by persons who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The Section 508 Accessibility Testing and Training Center (T&TC) was consulted and modifications to the GUI have been made to meet the requirements for 508 Compliance. The Primary Care Management Module GUI has been modified to allow screen readers, used by the visually impaired, to accurately interpret information on the screens. As a result, some buttons and boxes have been moved, replaced, or renamed and some screen titles have been modified. Although the developers have made every effort to retain the previous functionality, some functionality may have changed.

For more information on the VA 508 Compliance efforts, please visit the following website http://www.va.gov/oit/ea/section508/ .

Sensitive Information

To avoid displaying sensitive information regarding our patients and staff, the examples in this manual contain pseudonyms or scrambled data instead of real names. Our patients and staff will be referred to as PCMMPATIENT, ONE, PCMMPROVIDER, ONE, or PCMMUSER, ONE. Scrambled data is a series of random letters that replace a real name like AAADY, JWHTRE. Likewise real social security numbers (SSNs), real addresses and other personal identifiers are not used.

Windows Conventions

The startup, setup, and assignment functions for PCMM use a graphical user interface (GUI). You may refer to the Windows Conventions Section for an explanation of the windows elements and form buttons used by the module.

Autolinks - (This functionality has been disabled.)

Autolinks connect a team with a set of wards, inpatient beds, practitioners, specialties, and clinics. **NOTE:** You cannot assign a patient to a primary care team or practitioner via AutoLinks. Autolinks will be used for inpatient teams by OE/RR.

Report Templates

The Query Template Utility is provided on the GUI side to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). The templates may then be used to print the reports in the future without having to make sort selections and category selections each time.

Non Primary Care Team set up for OIF OEF Case Management

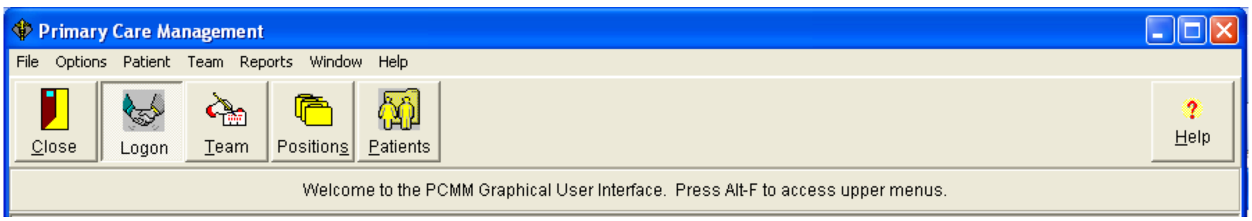
In order to track seriously ill Operation Iraqi Freedom/ Operation Enduring Freedom (OIF/OEF) patients, they are assigned to the Transition Patient Advocate (TPA) resource. This is tracked by setting up a non-primary care team with the TPA as a position on the team. Patients identified for this program are assigned to the team. Previously only primary care teams were transmitted to Austin. This feature includes altering how transmissions are screened and transmitted. This non-primary care team information is now transmitted to Austin along with the primary care teams.

For further information, see sections in this manual on Setting up OIF/OEF Team, Team Setup, and Position Setup.

Starting PCMM

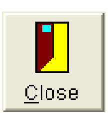
When the Primary Care Module is started, the Menu and Toolbar below is displayed. Select either the FILE|VISTA LOGON menu bar command or the LOGON speed button to start.

Notice the status bar on the bottom of the screen consisting of seven segments. The first segment is used to display status messages when a SAVE action has successfully completed. The second segment indicates whether you are connected (if so, where) or not connected to VistA. The third shows the on/off status of the NUM LOCK key. The fourth displays insert/overwrite status but is not functional at this time. The fifth displays the current PCMM GUI version number. The sixth displays the current PCMM GUI patch number. The seventh contains the current time.



Click the OPTIONS|PREFERENCES menu bar command – then *Fonts* and/or *Background Colors* if you wish to change the font and/or background color used in the PCMM GUI.

Toolbar Speed buttons

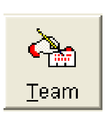


Close Application

Disconnects from the network and closes the application. If the network connection is still active, you will get a confirmation request before closing the application.

Connect to/Disconnect from VistA

Logs on/off the network

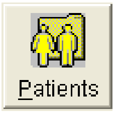


Team Setup

Opens the Select Team dialog box/Primary Care Team Profile form

Position Setup

Opens the Select Team dialog box/Primary Care Team Position Setup form



Assign Patients
Opens the Patient Lookup dialog box

Show Associated Help
Opens the PCMM Help File

Logging On

When either the FILE|VISTA LOGON menu bar command or the Connect to VistA speed button is clicked, the VistA Sign-on dialog box opens. System information concerning where you are currently working is provided. Enter your access code followed by the tab button. Enter your verify code and click the OK button. (The PCMM option must be assigned to you. If you get a message stating you are not registered to use PCMM, contact your IRM Service.)

PCMM Parameters (PCMM Reassignment Mail Group)

Clicking the OPTIONS|PCMM PARAMETERS menu bar command opens the PCMM Parameters list box which displays the name of the PCMM Reassignment Mail Group. Members of this group receive the mail messages generated by the reassignment functionality. A new mail group, PCMM REASSIGNMENT, appears as the initial entry in this field.

If you wish to change the mail group, click on the down arrow. The current entry is deleted and a list of possible choices is displayed (a new mail group cannot be created here). Click on the correct entry and then the OK button. A confirmation box appears stating the parameter has been updated. Click the OK button in the confirmation box.

Tasks running in the background create the bulletins that it sends to this mail group

Background Tasks

PCMM Nightly Task [SCMC PCMM NIGHTLY TASK]

This task should be scheduled once a day. It reviews Patient Primary Care team position assignments and flags and inactivates patients as follows.

Step 1
Determine if the patient is new or established based on the length of time the patient has been assigned to the PCP position; if assigned to the position 12 months or less, then NEW; if assigned to the position more than 12 months, then ESTABLISHED.

All providers assigned to a particular position are evaluated. In this way any encounter kept for any of those providers (within their activity on the position) would count. The following rules apply.

- The same provider can be assigned, unassigned, assigned again, etc. Several segments of a local array are created for the same provider, if assigned more than once.
- If a patient is assigned to PC position, and a provider assigned to that position has a preceptor, then all appointments for that patient have to be matched with both the provider (preceptee) from the PC position the patient is assigned to and with the preceptor provider as well. The range of days to be evaluated for the preceptor, if any, will be the same as identified for the PC provider.
- If a patient is assigned to the PC preceptor position then only the provider(s) assigned to that position is (are) evaluated. The preceptor can have multiple preceptees assigned to the related positions, but it is not realistic to evaluate all of them.

Step 2
If a patient is NEW and it is the 11th month since being assigned to the position, check to see if the patient has any prior encounters with the PCP/APs in the preceding 11 months + 7 days and, if no encounters, flag for inactivation. Note that the look back should be for an encounter with any person that occupied the PCP/AP positions in the past 11 months + 7 days. On month 12, if still no encounters with PCP/AP in the preceding 12 months + 7 days, inactivate. The 7 days time period will take into account the fact that the provider often sees the patient and then a day or two later assigns them to their panel.

Step 3
If a patient is ESTABLISHED, check to see if the patient has had any prior encounters with the PCP/AP in the preceding 23 months + 7 days and, if no encounters, flag for inactivation. On month 24, if still no encounters with PCP/AP in the preceding 24 months + 7 days, inactivate. Again, check for encounters with any persons that occupied the PCP/AP positions in the last 24 months + 7 days.

> **Note:** Inactivation will take place either on the 15th or last day of the month, immediately after the calculated inactivation.
>
> Flagging and unflagging patients for inactivation will take place each time SCMC PCMM NIGHTLY TASK is running. If any patients are flagged, then in addition to the current email messaging functionality, a message with the Subject line "Patient Scheduled for Inactivation from Primary Care Panel" will be sent to the PCMM PATIENT/PROVIDER INACTIVE Mail Group.

This task also identifies staff members who are improperly assigned as Primary Care Providers (PCP). See Inactivation Messages section for examples of the types of bulletins that are sent.

HL7 Transmission [SCMC HL7 TRANSMISSION]

This task should be queued to run nightly. It will go through the PCMM HL7 EVENT (#404.48) file and send HL7 massages to the National Patient Care Database (NPCD) in Austin.

Inactivation Messages

Inactivation messages are addressed to the PCMM PATIENT/PROVIDER INACTIVE mail group. PCMM Coordinators and others who will be monitoring inactivation should have membership in this group. Examples of the five Bulletins are provided on the following pages.

Patients Scheduled for Inactivation from Primary Care Panel

```
Subj: Patients Scheduled for Inactivation from PC Panel  [#5404]
12/20/05@09:43  33 lines
From: POSTMASTER  In 'IN' basket.   Page 1
-------------------------------------------------------------------------------
Patients scheduled for inactivation from their Primary Care team and
Primary Care Provider assignments appear below.

Flagging of primary care patients from a PCMM panel occurs each time this
Inactivation Task is run.
All providers assigned to a particular position are evaluated.
If a patient is assigned to a PC position and the provider assigned to that
position has a preceptor all encounters for the patient will be checked for
matches with either the provider (preceptee)assigned to that position or
the provider (preceptor) assigned as preceptor to that position.
If a patient is assigned to the PC preceptor position then only the encounters
with the provider assigned as preceptor will be evaluated.
(a) If a patient is NEW and it is the 11th month since being assigned to
the position, and the patient had no prior encounters with the PCP/APs in
the preceding 11 months + 7 days then the patient is flagged
for inactivation.
(b) If a patient is ESTABLISHED and if the patient had no prior encounters
with the PCP/AP in the preceding 23 months + 7 days the patient
is flagged for inactivation.
Inactivation will occur on the fifteenth and the last day of the month
unless the patient has a completed appointment encounter with their current
Primary Care Provider (PCP) or their Associate Primary Care Provider (AP)
before that date. The patient may be reactivated to their previous PCP and PC
team if they return for care.
This message is generated each time when at least one new occurrence of
flagging for inactivation takes place, and unconditionally on the 15th and
the last day of a month.
Patients scheduled for Inactivation from Primary Care panels
                                                              Date
                                                              Scheduled
Patient Name         SSN   Provider              Team         for Inactivation
------------------------------------------------------------------------------


      INSTITUTION: ABCD VAMC
PCMMPATIENT, ONE     2222  PCMMPROVIDER, EIGHT    BLUE TEAM   04/29/06
PCMMPATIENT, TWO     5555  PCMMPROVIDER, ELEVEN   BLUE TEAM   04/29/06
Enter message action (in IN basket): Ignore//
```

Patients with Extended PCMM Inactivation Dates

```
Subj: Patients With Extended PCMM Inactivation Dates  [#5405] 12/20/05@09:43
39 lines
From: POSTMASTER  In 'IN' basket.   Page 1
-------------------------------------------------------------------------------
By using the Extend Patient Inactivation Date option, these patients'
PCMM inactivation dates are now 60 days from their original inactivation date.
Inactivation occurs on the fifteenth and the last day of the month, unless
the patient has a completed appointment encounter with their current
Primary Care Provider (PCP) or their Associate Primary Care Provider (AP)
before that date. The patient may be reactivated to their previous PCP and PC
team if they return for care.
Patients with Extended PCMM Inactivation Dates
                                                           Date
                                                           Scheduled for
Patient Name         SSN  Provider             Team        Inactivation
------------------------------------------------------------------------------


      INSTITUTION: ABCD VAMC
PCMMPATIENT, FOUR    9999 PCMMPROVIDER, SEVEN  BLUE TEAM   04/12/06

Enter message action (in IN basket): Ignore//
```

Patients Automated Inactivations from Primary Care Panels

```
Subj: Patients Automated Inactivations from PC Panels  [#5406]
12/20/05@09:43  965 lines
From: POSTMASTER  In 'IN' basket.   Page 1
-------------------------------------------------------------------------------
Patients inactivated from their Primary Care team and Primary Care Provider
assignments appear below.
Inactivation occurs on the fifteenth and the last day of a month, unless
the patient has a completed appointment encounter with their current
Primary Care Provider (PCP) or their Associate Primary Care Provider (AP)
before that date.
Inactivation of primary care patients from a PCMM panel occurs under
the following circumstances:
(a) The patient expires
(b) Newly assigned patients (either newly-enrolled patients or patients who
have been re-assigned to a different provider) who have not been seen by
their PCP or Associate Provider (AP) and 12 months have passed since the
time of assignment to that provider.  This provides every PCP a 1-year grace
period for seeing patients added to their panel (either newly-enrolled
patients or patients transferred from a different panel) before they are
inactivated. Patients must be seen by their PCP or AP within 12 months +7 days
of being assigned, or they need to be inactivated from the PCP's panel.
(c) Established patients that have been assigned to the PCP's panel for more
than 12 months, but have not been seen by their PCP or AP in the past
24 months +7 days need to be inactivated.
The patient may be reactivated to their previous PCP and PC team if they
return for care.
Patients Automated Inactivation from Primary Care Panels
                                                           Date        Reason
                                                           Patient     Patient
Patient Name         SSN  Provider              Team       Inact       Inact
-------------------------------------------------------------------------------

      INSTITUTION: TEST VAMC
PCMMPATIENT,ONE      9736 PCMMPROVIDER,ONE      TEST TEAM  08/08/05    NO APPT
PCMMPATIENT,NINETY   5894 PCMMPROVIDER,THIRTY   TEST TEAM  05/17/04    DECEASED

Enter message action (in IN basket): Ignore//
```

Primary Care Providers Scheduled for Inactivation

```
Subj: Primary Care Providers Scheduled for Inactivation  [#5408] 12/20/05@09:44
64 lines
From: POSTMASTER  In 'IN' basket.   Page 1
-------------------------------------------------------------------------------
WARNING- The following primary care staff will be automatically
inactivated in PCMM software if a correct 'Person Class' and
'Provider Type' are not entered in the New Person File (#200) or
their role and position in the 'Position Setup' window is not
corrected to correspond with their 'Provider Type', 'Person
Class' and the Primary Care business rules stated below:

1. Staff designated as Primary Care Providers (PCPs) in PCMM that
   are not an Attending physician (Attending MD or Attending DO), NP
   or PA, shall be inactivated from PCMM
2. Staff designated as Associate Providers (APs) in PCMM, that are not
   a Resident/Intern (Physician), NP or PA shall be inactivated in
   PCMM
3. All persons designated as an Associate Provider or Primary Care
   Provider, who do not have the correct 'Provider Type' and 'Person
   Class' entered in the New Person file (#200) in VistA, shall be
   inactivated from their Primary Care positions in PCMM six months
   after installation of patch SD*5.3*297 Date: JUL 12,2006.
4. Please contact your PCMM Coordinator or Information Systems
   to correct these problems


  PRIMARY CARE PROVIDERS SCHEDULED FOR INACTIVATION

Provider's     Assoc     Team                      Person    # of Pts  Sch Inac
Name           Clinics   Position   Role           Class     Assigned  Date
-------------------------------------------------------------------------------


      INSTITUTION: TEST VAMC
PCMMPROVIDER,ONE        INT AP INT INTERN (PHYSIC Allopathic and 2    01/31/06
PCMMPROVIDER,SIX        INT AP ADM ADMIN COORDINA Allopathic and 0    01/31/06
PCMMPROVIDER,TEN        PHYS AS AD ADMIN COORDINA Physicians (M. 0    01/31/06

Enter message action (in IN basket): Ignore//
```

Primary Care Providers Inactivated

```
Subj: Primary Care Providers Inactivated  [#5526] 12/20/05@10:28  6 lines
From: POSTMASTER  In 'IN' basket.   Page 1
--------------------------------------------------------------------------------
  PRIMARY CARE PROVIDERS INACTIVATED

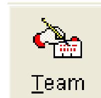
Provider's     Assoc     Team                      Person    # of Pts  Inac
Name           Clinics   Position   Role           Class     Assigned  Date

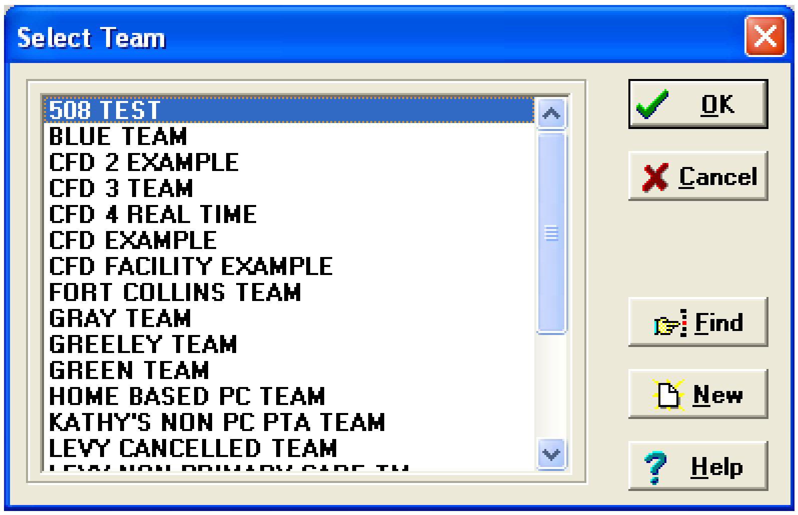
--------------------------------------------------------------------------------

Enter message action (in IN basket): Ignore//
```

Team Setup

Create a New Team

1. Click on the Team Setup toolbar speed button  or select the TEAM|SETUP menu bar command.

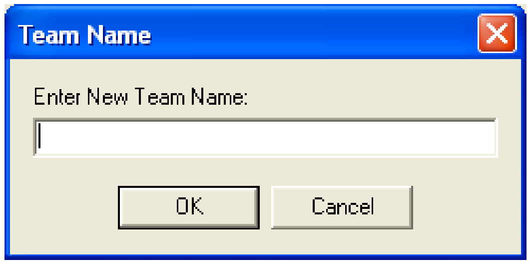


Select Team Dialog Box Information
Click on the desired entry to highlight it, and then click on the **OK** button to select. Clicking on **Cancel** closes the dialog box without selecting an entry. The scrollbar can be used to move up and down the list to find the desired entry. The **Find** button can be used to find a specific entry. If more than one match is found, the list box will clear and only the matching entries will be displayed. The **New** button allows you to enter a new team name. After entering the name, click on the OK button within the New Team dialog box.

NOTES
Names are saved in all uppercase letters.
If the TEAM/ACTIVE ONLY menu bar command is selected, only active teams appear for selection.

2. Click the NEW button of the Select Team dialog box and enter the new team name (3-30 characters).

Create a New Team



3. The Primary Care Team Profile form appears. When initially setting up a team, information should be entered on the General and Settings tabs before clicking the SAVE button to store the data.

Note: Required fields are signified in this documentation by an asterisk ***** next to the field name. If all required fields are not completed, the SAVE button will not be enabled and you will not be able to save the information.

You may refer to the Windows Conventions Section for an explanation of the standard windows objects (i.e., list box, lookup box, etc.) and form buttons.

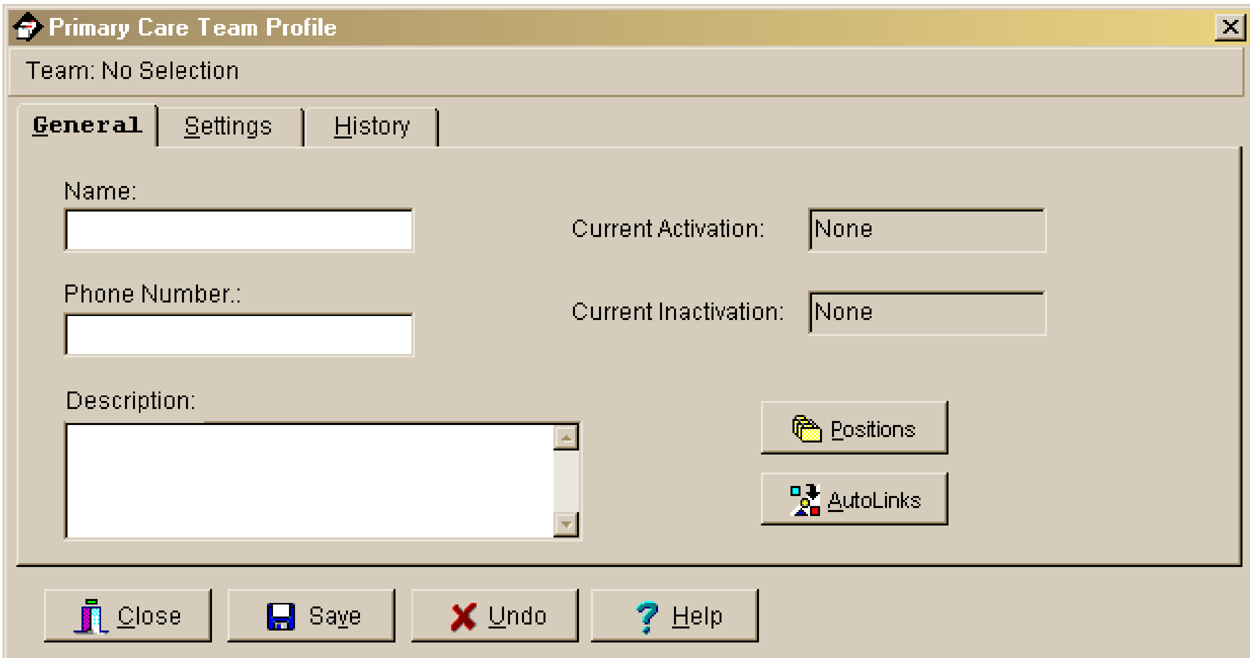
4. Enter the team information on the General and Settings tabs. (See following pages). When creating a new team, data entry is not required on the History tab. The History tab will not be available for a new team until the initial entry is saved.
After you have entered all required data for the new team, click the SAVE button.

5. The popup calendar appears. Click on the date you wish to enter as the team activation date and click OK. The team has now been established.

If you wish to create positions on the team at this time, go back to the General Tab and click on the POSITIONS button. See the “Assign Positions to a Team” section under Team Setup for instructions.

Create a New Team

Primary Care Team Profile Screen
General Tab



Field Descriptions

***Name (text box)**
The name of the team, 3-30 characters in length. If the new team name matches an existing team name, you will be so notified and asked for a different name.

Phone Number (text box)
Enter a phone number for the team, 3-20 characters.

Description (text box)
Any descriptive information specific to the team.

Current Activation (Label)
This label field displays the most recent activation date for the team.

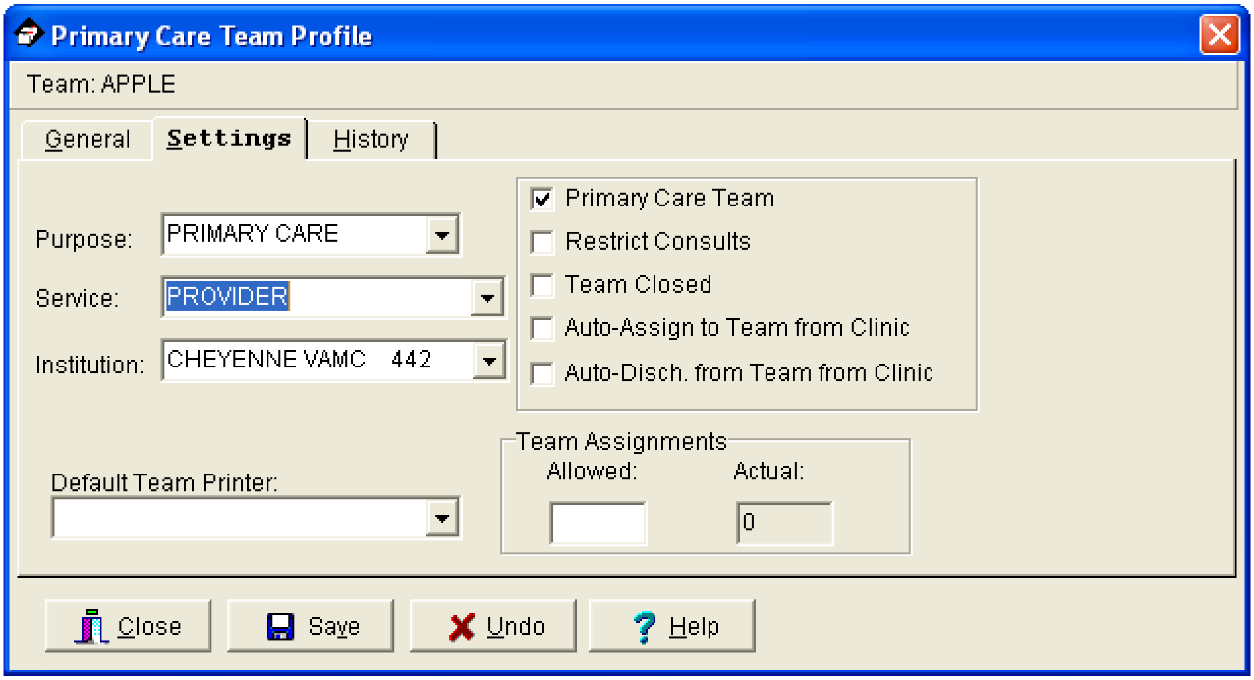
Current Inactivation (Label)
This label field displays the most recent inactivation date for the team.

Positions (button)
This button takes you to the Team Positions Setup Screen.

Autolinks (button) (FUNCTIONALITY DISABLED)

Create a New Team

Primary Care Team Profile Screen
Settings Tab



Field Descriptions

***Purpose (drop down list)**
The Purpose defines the role of the team. Primary care would be the usual choice but other kinds of teams may include Inpatient Ward, Community Care, etc.

***Service (lookup box)**
This is the medical center service most closely associated with the team. It is an entry from the SERVICE file (#49) and includes clinical and non-clinical services.

***Institution (lookup box)**
This is the entry from the INSTITUTION file (#4) associated with the team. It includes VA and non-VA institutions.
NOTE: Each division at a multidivisional facility has its own entry in the INSTITUTION file.

Default Team Printer (lookup box)
The PCMM reports do not use this field.

Create a New Team

Primary Care Team Profile Screen - Settings Tab

Primary Care Team (check box)
Click in this box if this team can be the primary care team for any patient. Even if the team's purpose is not primary care, it still may be able to act as a primary care team. Only a team that can act as a primary care team may have a primary care practitioner position assigned to it.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the Make Consult Appointment option. A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Team Closed (check box)
Click in this box to close the team. Additional patients should not be added to a team if it is designated as closed.

Auto-Assign to Team from Clinic (check box)
Click in this box to automatically assign the patient to a team when he is enrolled in a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the associated clinic is unique to one team. It is recommended that **both** the Auto-Assign and Auto-Discharge boxes be checked or **neither** be checked.

Auto-Discharge from Team from Clinic (check box)
Click in this box to automatically discharge the patient from a team when he is discharged from a clinic that is an "associated clinic" of one of the team's positions. This will occur only if the patient has not been assigned to a team position.

Team Assignments (text box)

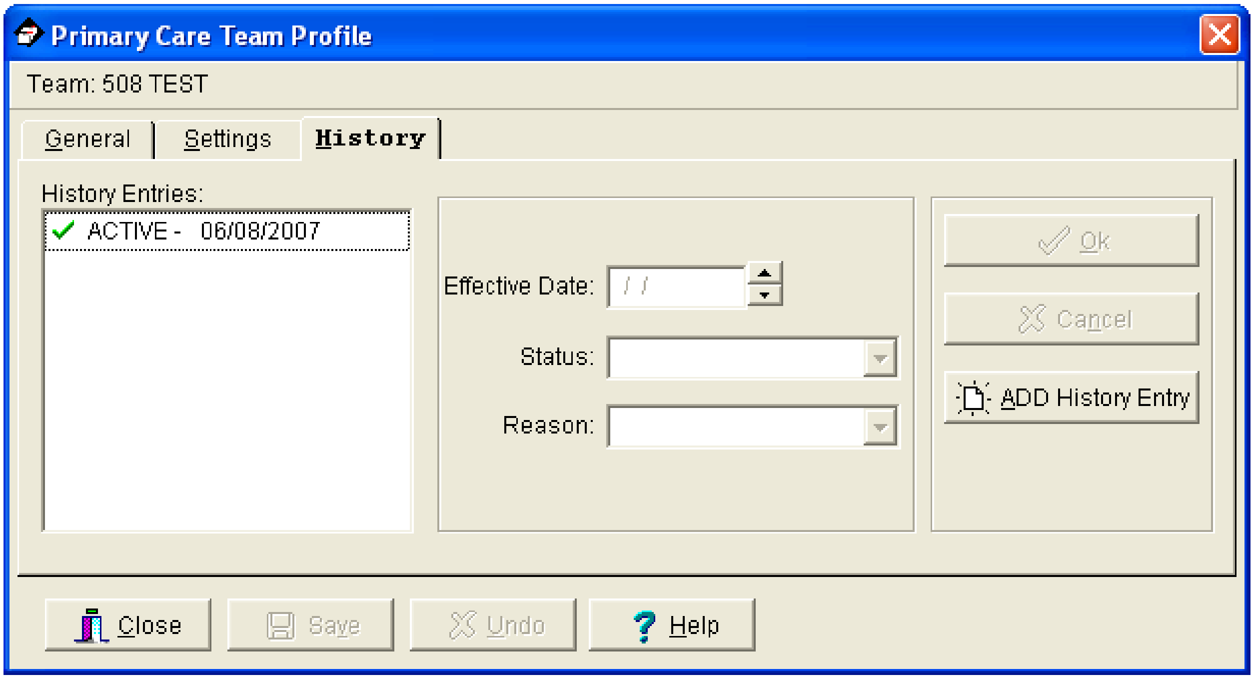
Allowed (numeric display)
This is the maximum number of patients that should be assigned to this team. Users are not prevented from adding additional patients to the team after the team's patient panel (list of patients) has reached this number. You should compare the current number of team assignments with the number allowed to balance team panel sizes.

Actual (numeric display)
This is the number of patients currently assigned to this team.

Create a New Team

Primary Care Team Profile Screen
History Tab

When creating a new team, no data entry is required on this tab.



Field Descriptions

History Entries (list box)
This display shows the history of status change dates for this team. Double clicking an entry **or** highlighting an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/22/96).

***Status (drop down list)**
This is the status of the team as of the effective date.

Create a New Team

Primary Care Team Profile Screen - History Tab

***Reason (drop down list)**
This is the reason for the change in the team's status.

OK (button)
Click OK to save changes.

Cancel (button)
Click Cancel to abort changes.

ADD History Entry (button)
Click ADD History Event to make changes in the activation/inactivation history.

Assign Positions to a Team

Note: The procedure for creating a resident position that is an associate provider has changed due to the fact the application now enforces the business rule regarding residents as PCPs. Note that before a resident position can be created as a PCP associate provider, the resident position must have a staff member assigned to the resident position and a preceptor assigned to the resident. To create a resident position, follow the steps in the Creating a Resident Position section which follows.

Creating a Team Position - General Instructions

If you have clicked on the Positions button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

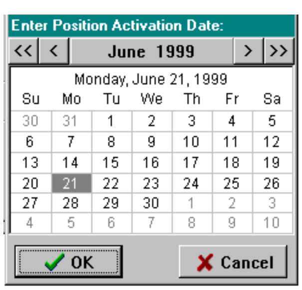
1. Select the TEAM|POSITIONS menu bar command.

2. Select the team from the Select Team dialog box and click the OK button. Note that you cannot add a new position to an inactive team.

3. When the Primary Care Team Position Setup form appears, click Add New Position and the New Position dialog box appears. Enter the name of the new position and click OK. Positions that can act as preceptors should be created first so that they will exist for the team.

4. Enter the position information on the General, Settings, and Messages tabs (see following pages.) When initially creating a position, you must save the General tab information first before entering information in the other tabs. Information should then be entered in the General, Settings, and Messages tabs and click the SAVE button to store the data. No data entry is required on the History tab when creating a new position. All data displayed in the edit boxes applies to the position displayed in the forms header.

5. Required fields are signified in this documentation by an asterisk ***** next to the field name. You will not be allowed to save until all required fields have been completed. After you have entered all required data for the new position and clicked the SAVE button, this popup calendar appears. Click on the date you wish to enter as the position activation date and click OK. The position has now been established.
Position history record is automatically deleted if you click the Cancel button on the Enter Position Activation Date window when creating a new position.



Assign Positions to a Team

If you wish to assign a staff member to the position at this time, click on the STAFF button. See the “Assign Staff Member to a Position” section under Team Setup for instructions.

Creating a Resident Position

1. Click Add New Position to create team position and enter the Position, Role, and Description. Click Save to save the position.

2. Assign staff to the position: Click Staff tab then click Assign button.

3. At the Staff lookup window, enter the last name of a Resident and click Search. A list of names will appear that match the last name you searched for. Click on the desired name and click OK to select it.

4. Enter the Effective date if necessary (it defaults to today's date), enter the Status if necessary, and Status Reason if necessary. Do not enter FTEE at this time. Click Save to save position. Because a Resident can't be a PCP unless precepted, you will need to set up a Preceptor before you will be able to enter FTEE.

5. Click Preceptor tab, then click Assign and select a Preceptor for this resident. Click Save to save preceptor. A NP or PA cannot be assigned as a preceptor for a resident (or intern).

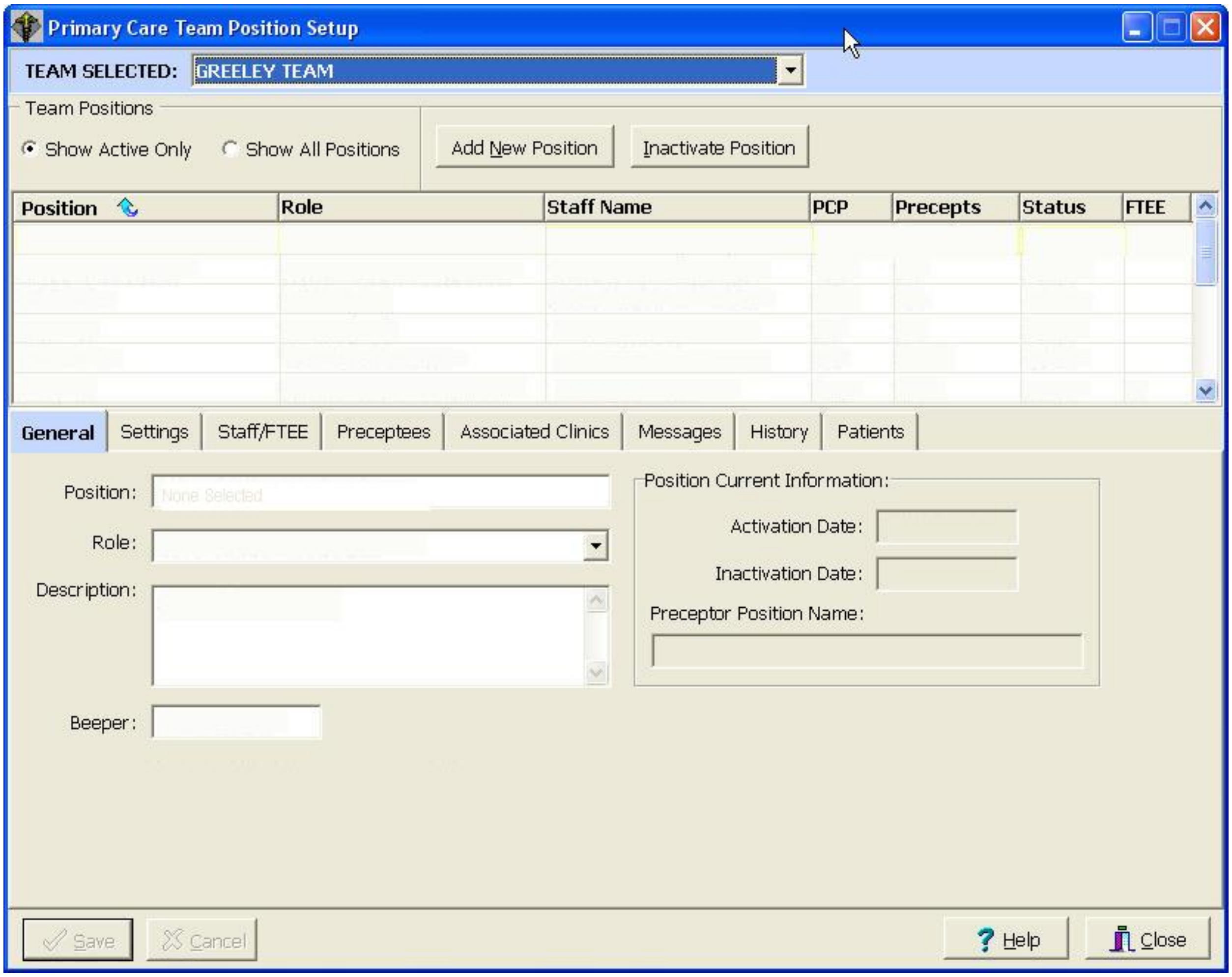
6. Click Settings tab, and click "Provides Primary Care as an Associate Primary Care Provider".

7. Enter the number of patients allowed for this position and click Save to save Settings.

8. Now you can enter the FTEE for this position. Click Staff/FTEE button. Click in FTEE edit box and enter the FTEE for this resident. Click Save.

Assign Positions to a Team

Primary Care Team Position Setup Screen



Features of the Primary Care Team Position Setup Screen

- Shows active/inactive team positions
- Displays role, staff name, PCP status, preceptor status, position status, and FTEE
- Central Save/Cancel buttons used to save all changes regardless of which tab user is on
- Selected team position highlighted as user navigates through tabs
- *Team Selected* dropdown list allows users to change teams without closing this screen
- Allows sorting of positions by 7 column headings – to activate a sort, place cursor at the column heading and click

Assign Positions to a Team

Primary Care Team Position Setup Screen

Field Descriptions

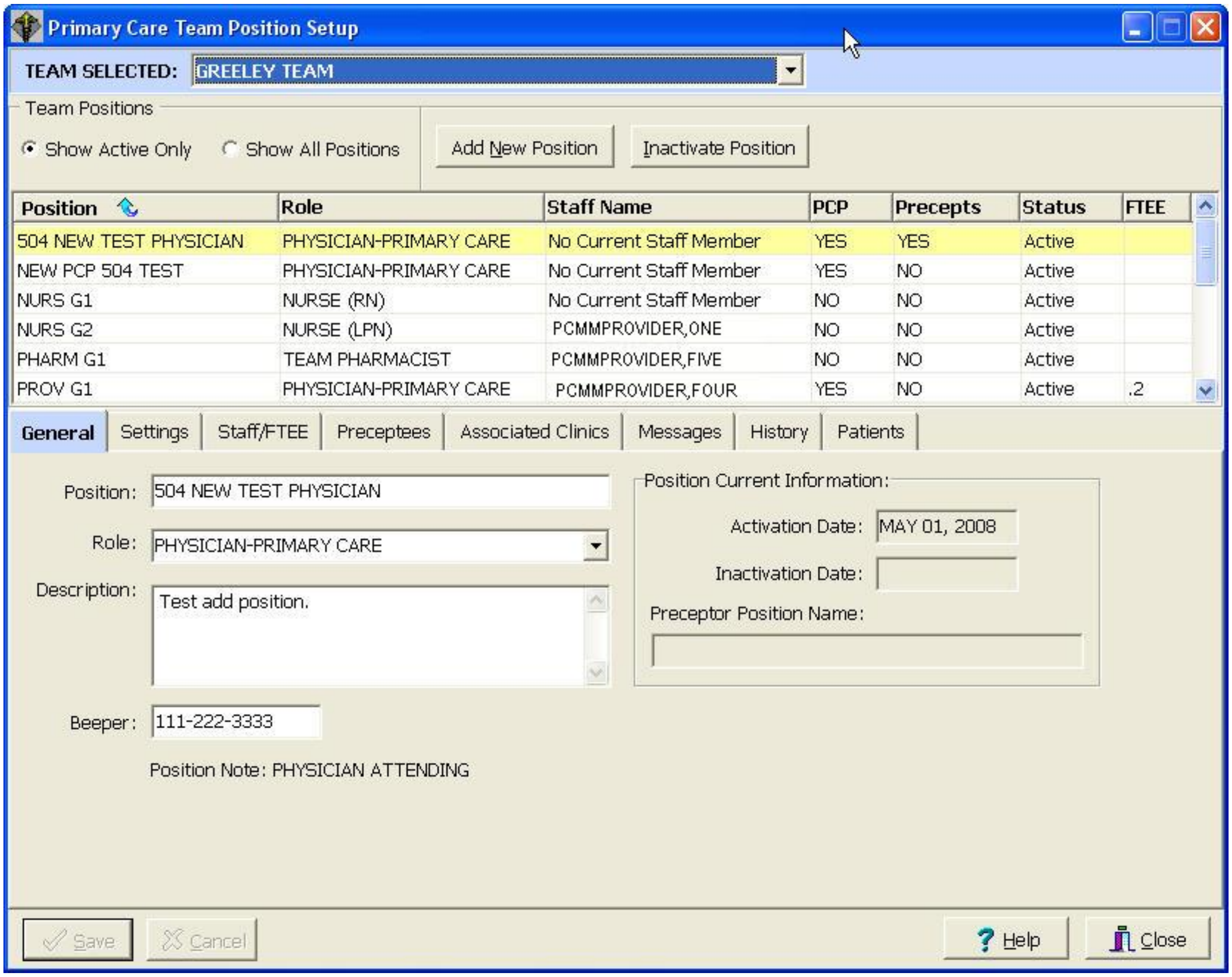
Team Selected
Displays the name of the current team you are working on. To change teams, click the drop down box and select another team name.

Team Positions (list box)
Displays team positions. The list box shows all team positions or only those currently active based on the Positions to Show selection. In order to select a position listed in the Team Positions list box, click on the entry **or** click the entry and press the spacebar.

Show Active Only, Show All Positions (radio button)
You may choose to show all positions associated with this team or only the currently active positions.

Assign Positions to a Team

Primary Care Team Position Setup Screen
General Tab



Position (text box)
The name of the position, 3-30 characters in length. If the new position name matches an existing position name on the current team, you will be so notified and asked for a different name.

Role (drop down list)
This is a list of standard roles to which the position is mapped.

Description (text box)
Descriptive information you may wish to add specific to the position.

Beeper (text box)
Beeper number for this position. This is a separate free text field. It is not linked to any other beeper or phone numbers in VistA.

Assign Positions to a Team

Primary Care Team Position Setup Screen - General Tab

Position Current Information (label)

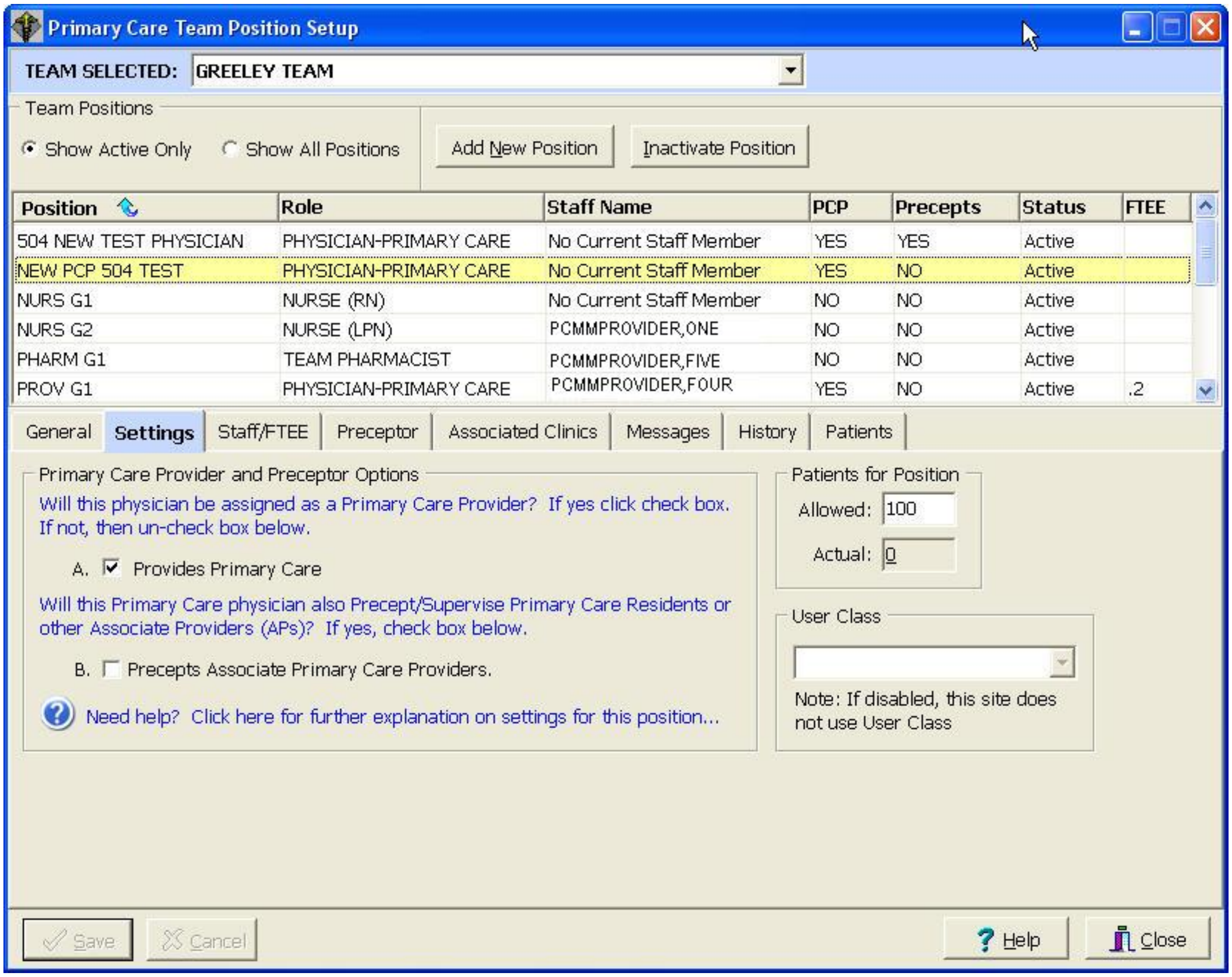
Activation/Inactivation Date
These label fields may display the most recent activation/inactivation date for the selected position.

Preceptor Position Name
A preceptor is a position that acts as a supervisor/monitor for this position.

Note: *Physician Attending* is displayed when the highlighted physician is also a preceptor.

Assign Positions to a Team

Primary Care Team Position Setup Screen
Settings Tab



NOTE: If a provider other than an Attending, Resident/ Intern, PA or NP is selected, both boxes A and B will **not** be selectable.
Box "Allowed" under Patient for Position" is selectable for any position but its entry is required for the PCP staffed position and optional for other position.

Field Descriptions

Provides Primary Care (check box)
Only a Resident/Intern, NP, or PA shall be designated as an "Associate Provider" providing primary care.

Precepts Associate Primary Care Providers (check box)
Only an attending physician (MD or DO), NP, or PA can be designated a Precept to Associate Primary Care Providers.

Assign Positions to a Team

Primary Care Team Position Setup Screen - Settings Tab

Patients for Position (text box)

Allowed
The number of patients that should be assigned to this position. Users are not prevented from exceeding this number. It is required that you enter a value here before you can save Resident/Intern, NP, or PA as Primary Care Provider. Entry for all other positions that are not PCP ones are optional.

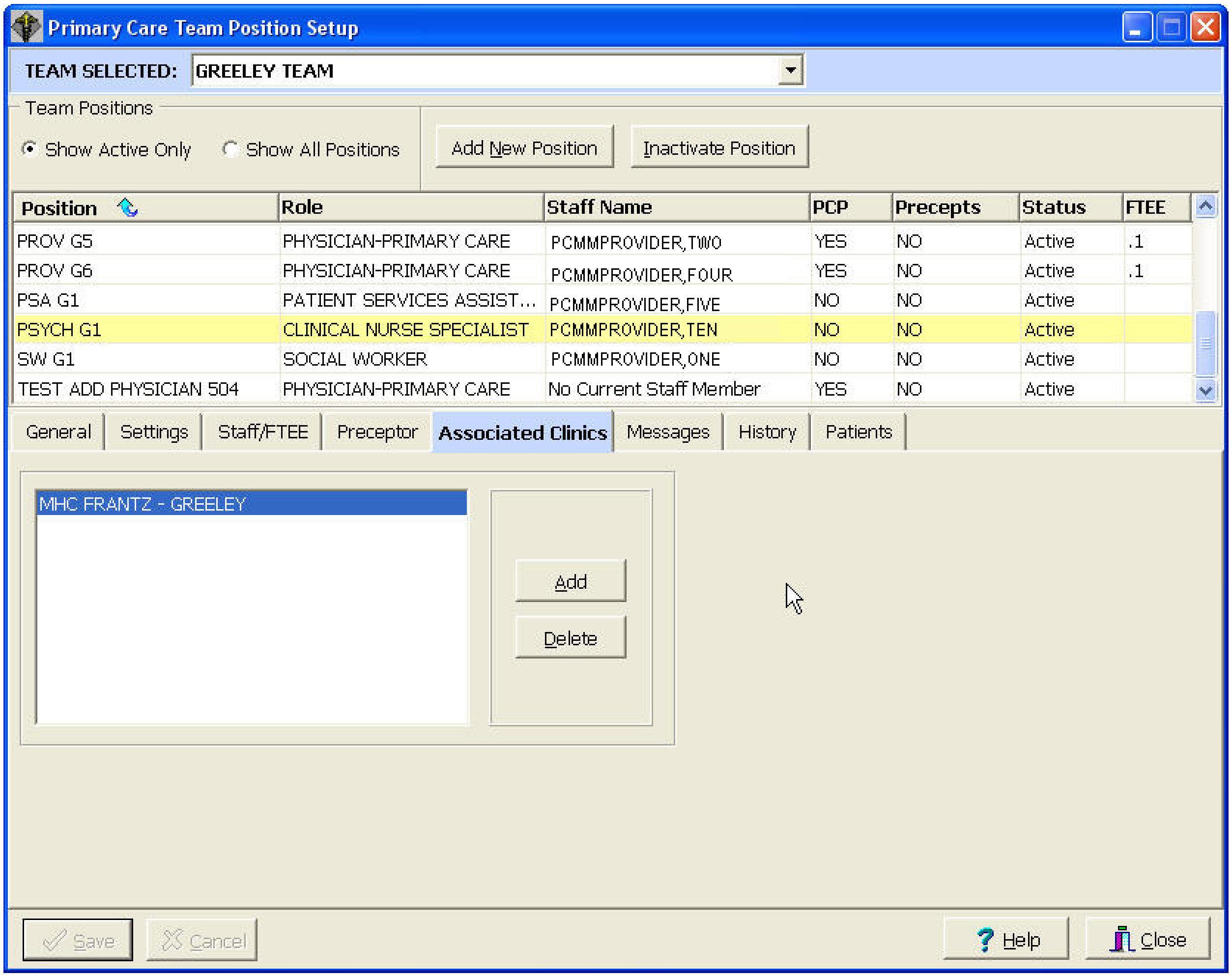
Actual
This is the number of patients that are currently assigned to this position.

User Class (lookup box)
This is the user class that must be used when selecting an individual to fill this position.
This field may be disabled at some sites.

See documentation for Staff/FTEE Tab in the Assign Staff Member to a Position section.
See documentation for the Preceptor/Preceptee Tab in the Assign Preceptor to a Position section.

Assign Positions to a Team

Primary Care Team Position Setup Screen
Associated Clinics Tab

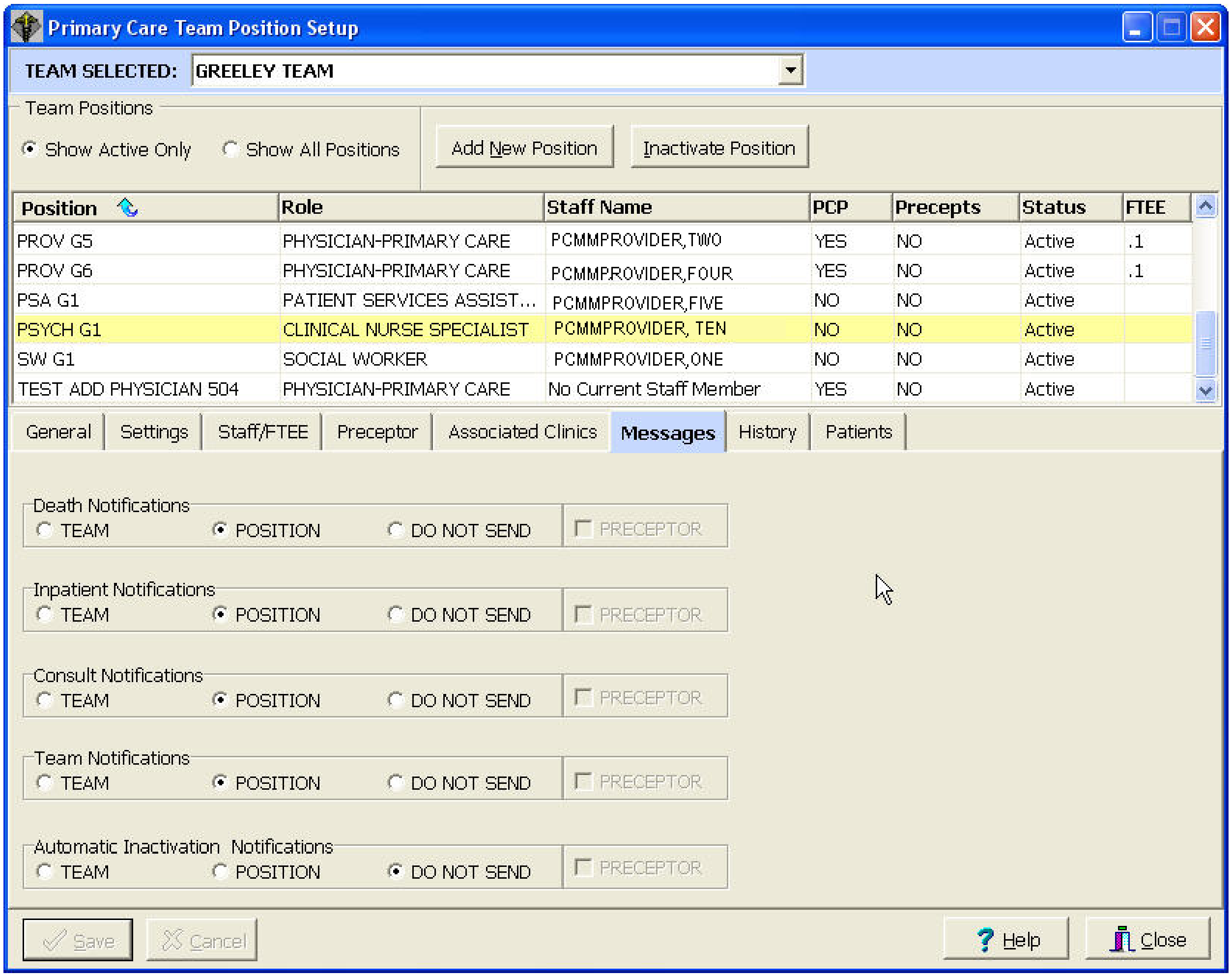


If there is an existing clinic you wish to associate with this position, it should be entered here. The application provides for entering and saving multiple associated clinics for primary care providers and for associate primary care providers. The associated clinics will print on all PCMM reports with an associated clinic column or field.

The entire name of the associated clinic is displayed and remains on display after saving changes.

Assign Positions to a Team

Primary Care Team Position Setup Screen
Messages Tab



As part of PCMM, you are able to control the transmission of MailMan messages to team positions. MailMan messages are categorized into patient death, inpatient activity, consult activity, and team activity. Check the appropriate button/box for each type of notification.

When creating a new position, be sure to click the SAVE button after data entry on this tab to store all the information you have entered here and on the previous two tabs.

Assign Positions to a Team

Primary Care Team Position Setup Screen - Messages Tab

Field Descriptions

Death Notifications
Will notify the recipient of entry/deletion of the DATE OF DEATH field for a patient

Inpatient Notifications
Will notify the recipient of an inpatient admission/transfer/discharge for a patient

Consult Notifications
Will notify the recipient of either an appointment being made or enrollment in a clinic in which the patient was not previously enrolled

Team Notifications
Will notify the recipient of a patient's team activity (assignment, discharge, etc.)

Automatic Inactivation Notifications
The software automatically checks the “Do Not Send” option of the “Automatic Inactivations Notifications” line for all active positions in PCMM.

Button Descriptions

Team
If checked, the position will receive messages that are generated for all the team's patients.

Position
If checked, the position will receive messages that are generated only for those patients in the team associated with the position.

Do Not Send
If checked, the position will not receive messages.

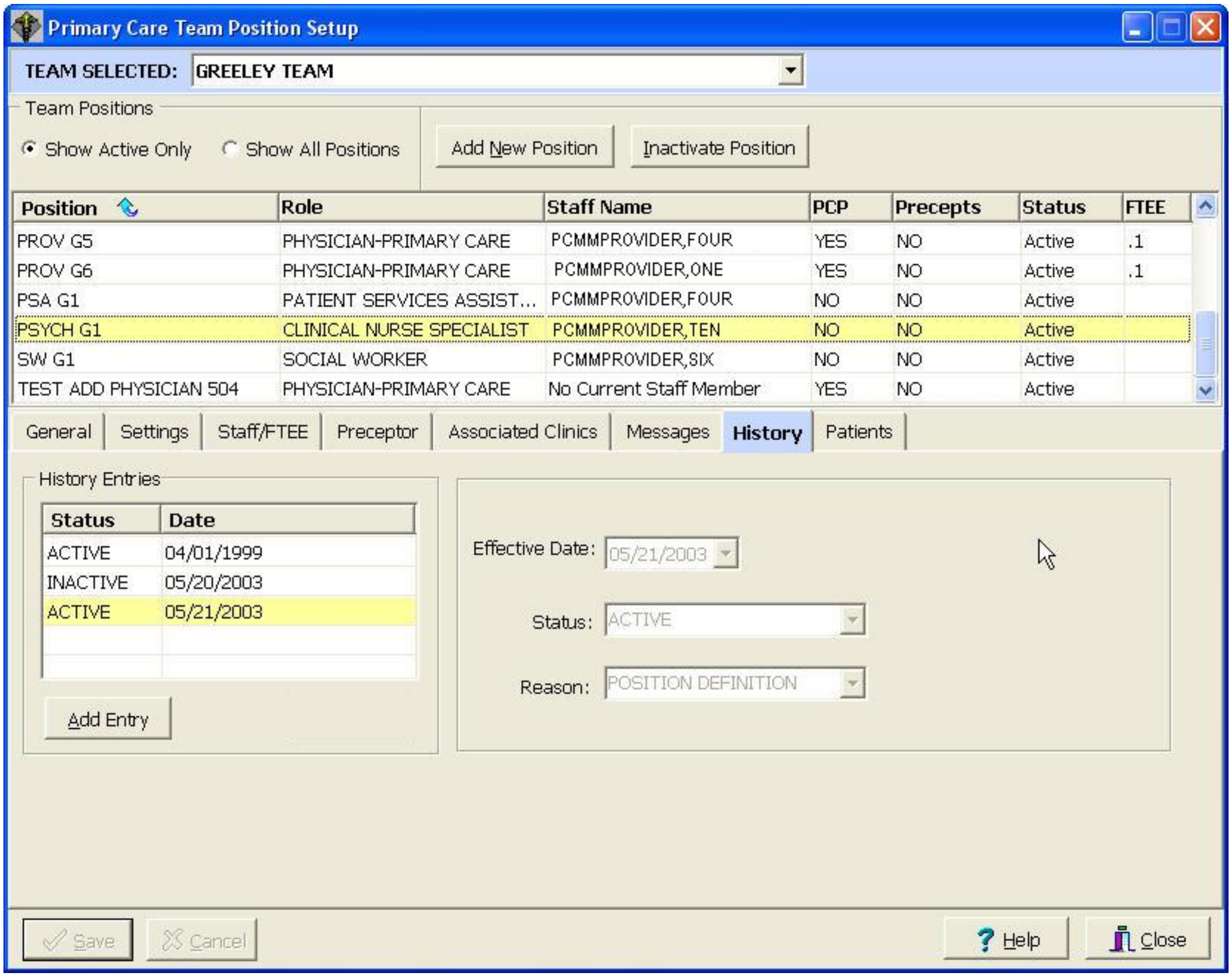
Checkbox Description

Preceptor
For each activity type - if checked, will add the position preceptor to the recipient list. The boxes will be disabled for preceptor positions.

Assign Positions to a Team

Primary Care Team Position Setup Screen
History Tab

When creating a new position, no data entry is required on this tab. The History Tab will not be available for a new position until the initial entry is saved.



Field Descriptions

History Entries (list box)
This display shows the history of status change dates for this position. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

Assign Positions to a Team

Primary Care Team Position Setup Screen - History Tab

***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96).

***Status (drop down list)**
This is the status of the position as of the effective date.

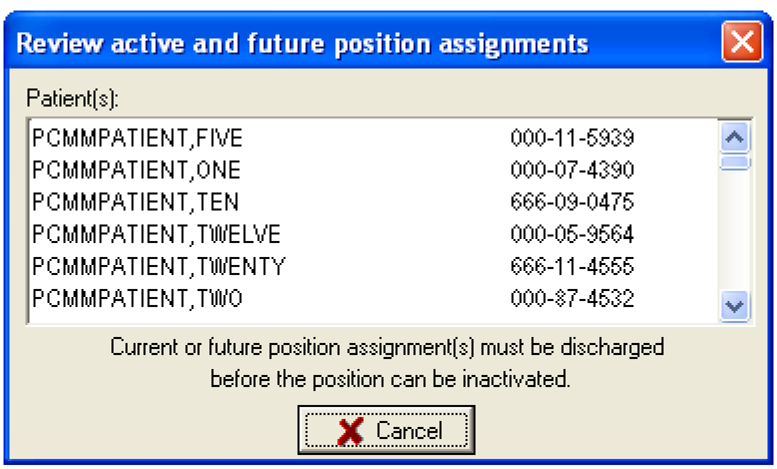
***Reason (drop down list)**
This is the reason for the change in the position's status.

Save (button)
Click Save to save changes.

Cancel (button)
Click Cancel to abort changes.

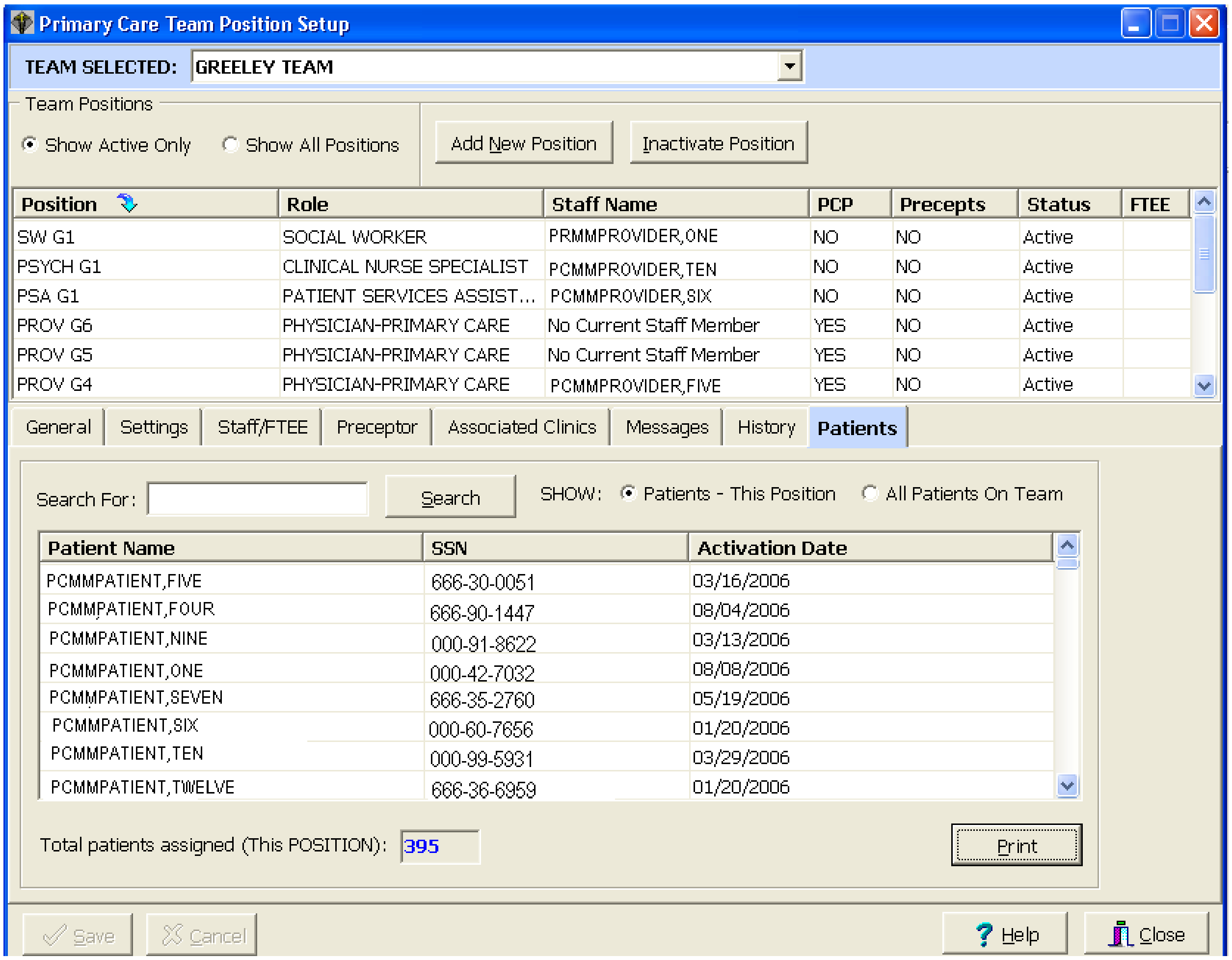
Add Entry (button)
Click Add Entry to make changes in the activation/inactivation history.

NOTE: If you attempt to inactive a position that has members assigned, you will get this warning screen.



Assign Positions to a Team

Primary Care Team Position Setup Screen
Patients Tab



The Patients Tab displays a list of all patients assigned to the team or selected position. The total number of patients assigned to the team/position is provided as well as search capability for a particular patient.

Assign Positions to a Team

Primary Care Team Position Setup Screen
Patients Tab

Field Descriptions

Search For: (lookup box)
Type the first three letters of the patient's last name in the box and press the Search button.

Show (radio button)
Displays all patients assigned to the team or only those patients assigned to the selected position depending on which radio button is checked.

Print (button)
Allows for printing of the patient list.

Assign Staff Member to a Position

(For positions that are NOT part of a preceptor link)

If you have clicked on the Staff button on the Primary Care Team Position Setup form, begin at Step 4. NOTE: You may also assign staff from the Team Position screen's Staff/FTEE tab.

1. Select the TEAM|ASSIGN STAFF menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position and click OK.

4. The Staff Assignment Add/Edit form appears. Click the ASSIGN button **or** choose the EDIT|ASSIGN MEMBER menu bar command.

5. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.

6. Enter FTEE for this position. It is required for a Primary Care Provider but optional for other staffed position.

7. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct. Close the form.

8. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button.

Assign Staff Member to a Position

(For positions that ARE part of a preceptor link)

1. Select the TEAM|POSITIONS menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position from the Primary Care Team Position Setup form and click the STAFF tab.

4. The Staff Assignment Add/Edit section appears. Click the Add Staff button.

5. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected. Staff members currently assigned to preceptor or precepted positions on the team may not be selectable depending on the type of position to which an assignment is being made.

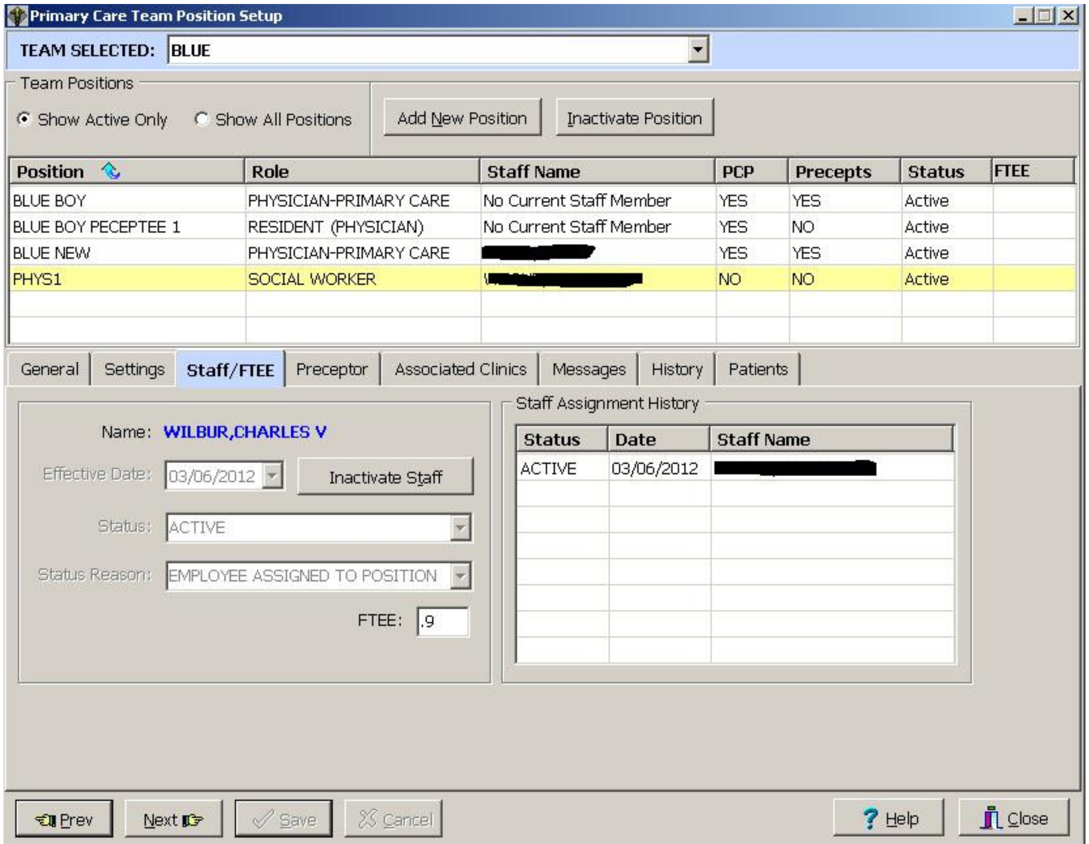
6. Enter FTEE for this position if it is for a Primary Care Provider. Entry for other positions is optional. NOTE: On Resident or other positions which need a preceptor, the position must be staffed and have a preceptor assigned before the FTEE field will be enabled.

7. The data fields on the Staff Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct.

8. To inactivate the current assignment, click the INACTIVATE button **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Click the SAVE button. If you inactivate a staff assignment for a position that is a current preceptor for another position and attempt to close the Staff Assignment Add/Edit form without creating a current staff assignment, your inactivation change will not be saved.

Assign Staff Member to a Position

Primary Care Team Position Setup Screen
Staff/FTEE Tab



When staff, positions, or teams are inactivated, they automatically default to T-1 (today minus one day).

A Non-primary care provider position or a position on a non-primary care team is not required to enter FTEE when originally staffed.

FTEE entered on any staffed position cannot be removed, but can be changed to another value when accepted. A staffed position with FTEE entered can have the value deleted if the person is INACTIVATED. This position can be populated with FTEE again after the position is staffed.

Field Descriptions

Effective Date

This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 03/16/12).

Assign Staff Member to a Position

Primary Care Team Position Setup Screen - Staff/FTEE Tab

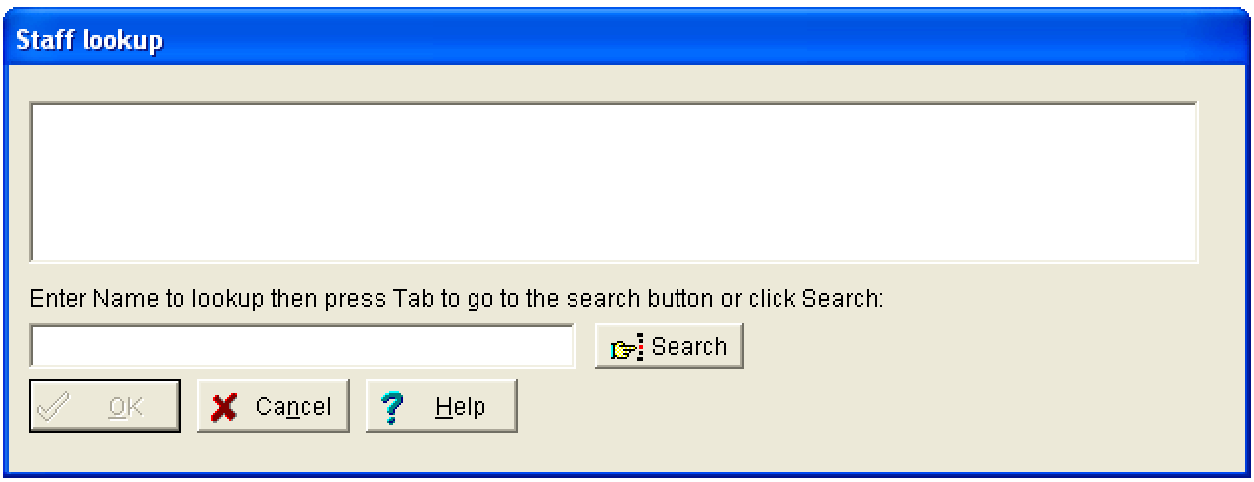
Status (drop down list)
This is the status of the staff member as of the effective date.

Status Reason (drop down list)
This is the reason for the change in the staff member's status.

FTEE (Full-time Employee Equivalent)
This is the decimal equivalent of the amount of time this position devotes to Patient Care. Entry of 0 for any staffed position is not allowed.

Staff Assignment History (list box)
This display shows the history of staff member assignment dates for the selected position. The displayed columns are Status (Active/Inactive), Date (date the position was Active/Inactive), and Staff Name. The last assignment date can be deleted using a right mouse click.

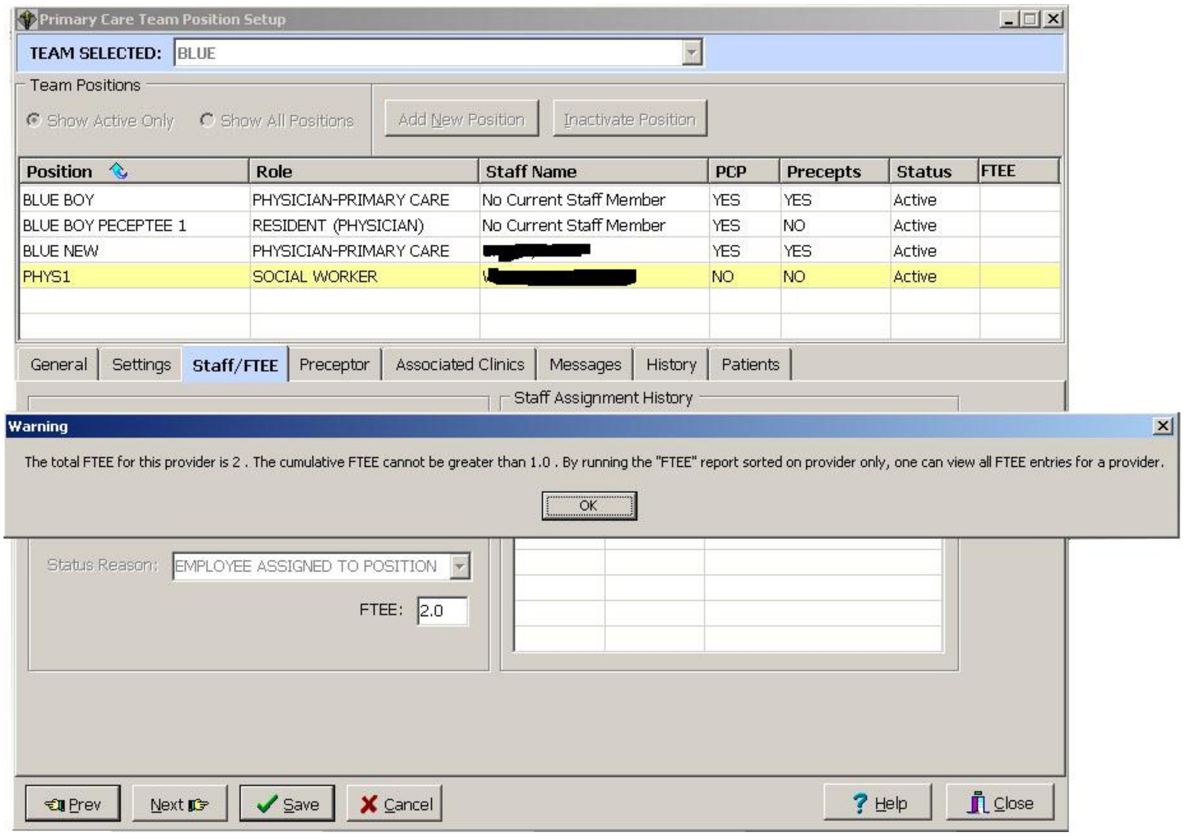
Add Staff (button)
Click on the Add Staff button to add a provider to this position. This will open the Staff Lookup Screen.



Type the first three letters of the provider's last name in the Staff Lookup box and press the Search button. Select a provider from the list and click OK.

Assign Staff Member to a Position

Primary Care Team Position Setup Screen - Staff/FTEE Tab



***NOTE:** PCMM prevents entry and transmission of provider FTEE values greater than one to AITC. The total FTEE for any role cannot be greater than one within an institution or within institutions with the same first three digits of the institution number. Entry of non-numeric data in the FTEE box will return a value of 99.1 when evaluated for FTEE compliance.

Assign Preceptor to a Position

Note: A staff member must be assigned to the preceptor position before a preceptor assignment can be made. Only positions eligible to be assigned a preceptor can have a preceptor assigned. The Add Preceptor button will be disabled if the position is not staffed or does not have the proper role to have a preceptor assigned. See the Business Rules section of this document for more information about preceptors.

1. Select the TEAM|POSITIONS menu bar command.

2. Select the team from the Select Team dialog box and click the OK button.

3. Select the position from the Primary Care Team Position Setup screen. Click the Preceptor tab.

4. Click the Add Preceptor button.

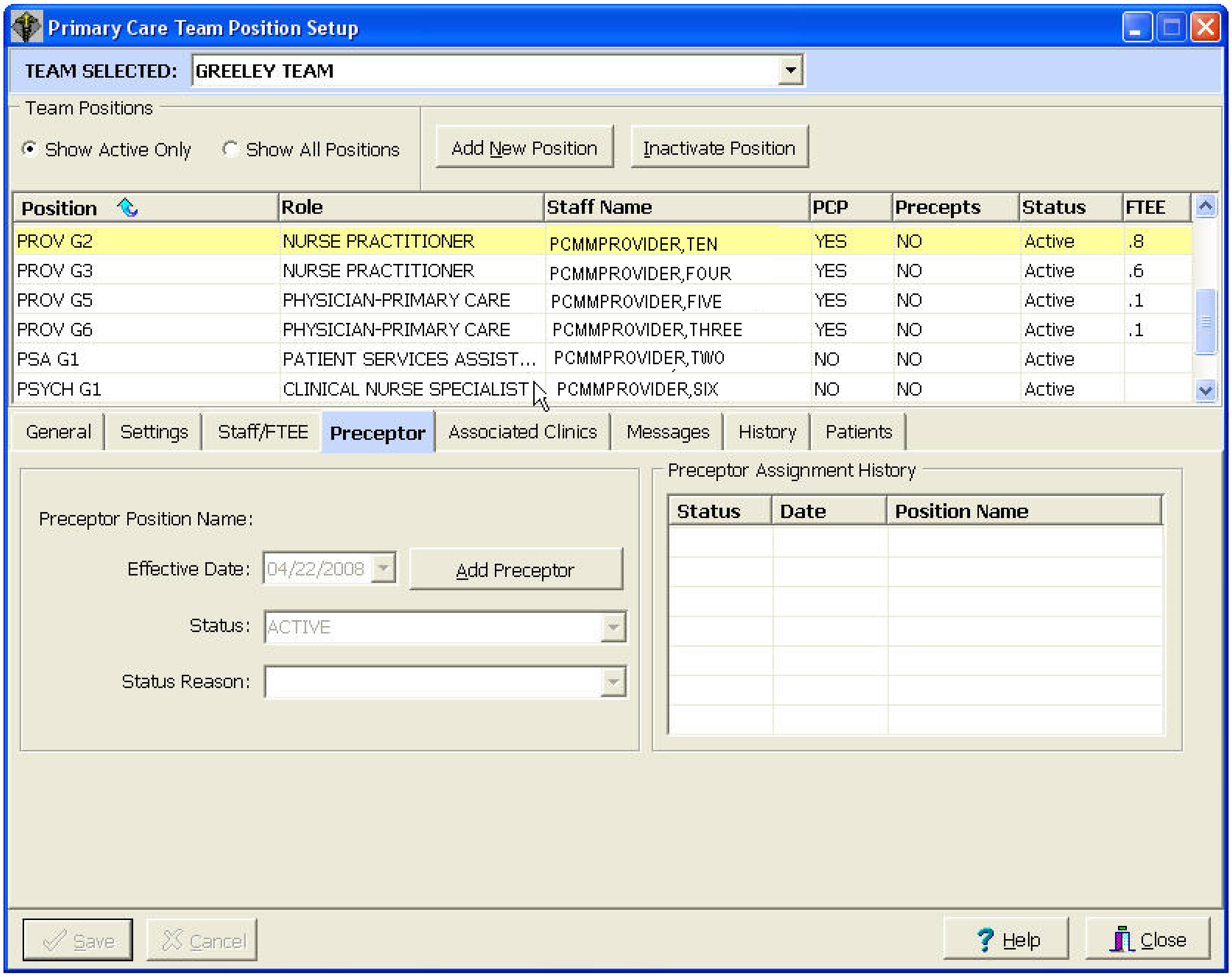
5. The Select Preceptor Position dialog box appears. Click on the desired preceptor position then click OK. Only names of designated preceptor positions for the current team will be available for selection.

6. The data fields on the Preceptor Assignment Add/Edit form will now be filled in. Click the SAVE button to accept these values, if correct.

7. To inactivate the current assignment, click the INACTIVATE button. Click the SAVE button. If you inactivate a preceptor for a position with current or future patient assignments and attempt to close the Preceptor Assignment Add/Edit form without creating a current preceptor assignment, your inactivation change will not be saved.

Assign Preceptor to a Position

Primary Care Team Position Setup Screen Preceptor/Preceptee Tab



A Preceptors/Preceptees Tab has been added to the Primary Care Team Position Setup screen to display the preceptor for a position, or if the position is a preceptor, it displays a list of preceptees.

Preceptees may be reassigned to another preceptor so that a particular preceptor may be deactivated.

A preceptor position may be changed to a non-preceptor position as long as the preceptor does not have preceptees assigned to him/her and no patients are assigned to that position.

Assign Preceptor to a Position

Primary Care Team Position Setup Screen – Preceptor/Preceptee Tab

Field Descriptions

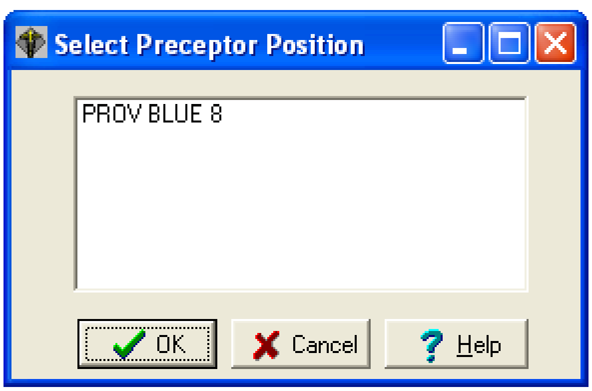
***Effective Date**
This is the date the status change will be effective. You may type the date in the date field, use the arrows, or double click in the edit box to drop down a calendar for date selection. Each component of the date must consist of two characters (i.e., 02/22/96).

***Status (drop down list)**
This is the status of the preceptor position assignment as of the effective date.

***Status Reason (drop down list)**
This is the reason for the change in the preceptor position assignment status.

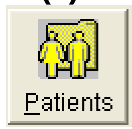
Preceptor Assignment History (list box)
This display shows the history of preceptor position assignment dates for the selected position. Double clicking an entry **or** clicking an entry and pressing the spacebar displays that entry's data in the edit boxes. A check mark next to an entry in the box indicates an activation date while the circle indicates an inactivation date.

Add Preceptor (button)
Clicking the Add Preceptor button will open the Select Preceptor Position screen.

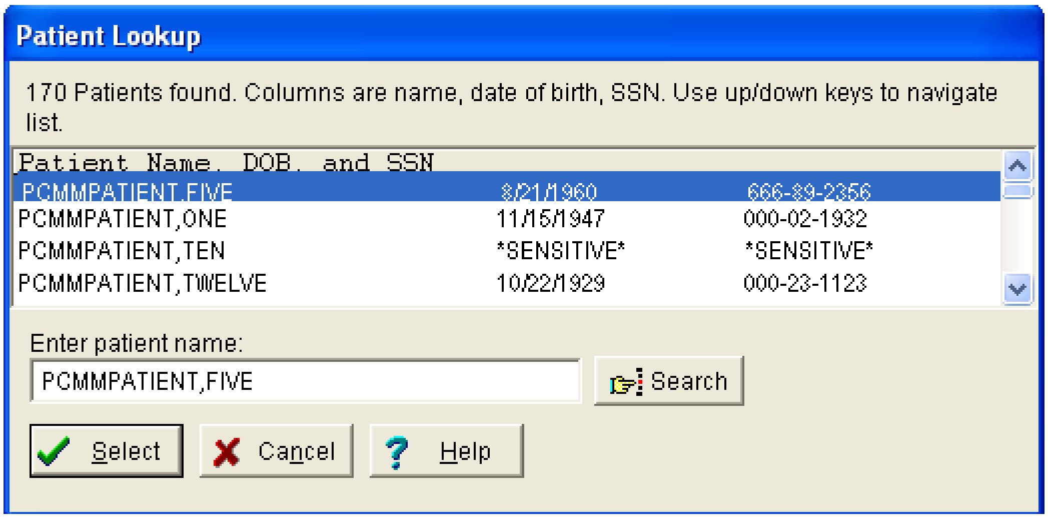


Select the desired preceptor from the list of Preceptors and click OK. This will activate the Preceptor Link.

Assign Single Patient to Team/Position(s)

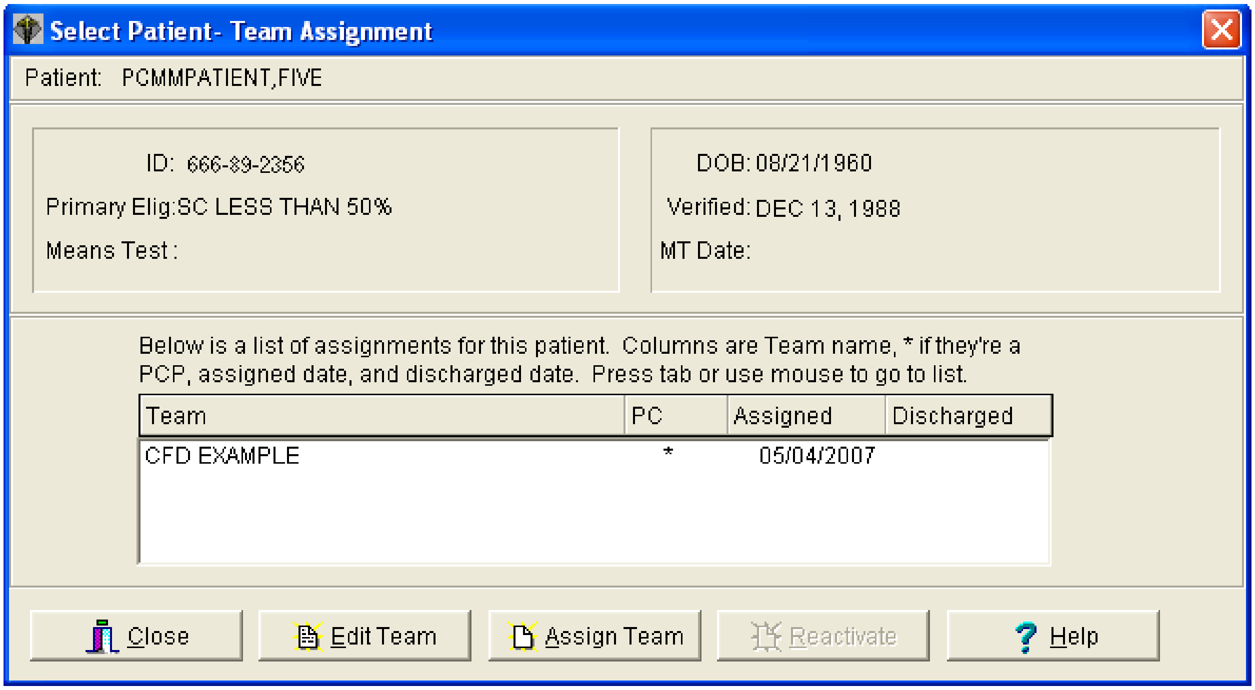


1. Click on the Assign Patients toolbar speed button or select the PATIENT|PATIENT ASSIGNMENT menu bar command.



2. The Patient Lookup dialog box appears. Type the patient name (last, first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button. Employee patients will display "sensitive" in the DOB and SSN columns. Accessing a sensitive patient record can trigger messages and bulletins being sent. If there is another patient with the same last name and same last four digits of the SSN as the selected patient, a warning message will appear to ensure you have selected the correct patient. If the selected patient requires a Means Test, a message will be displayed.

Assign Single Patient to Team/Position(s)



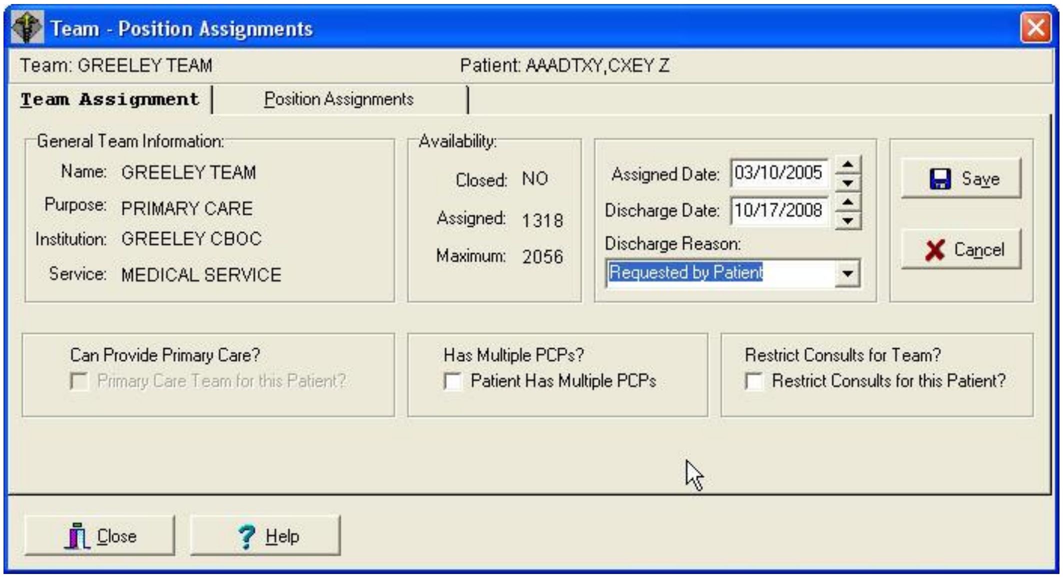
3. The Select Patient-Team Assignment screen appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. All team assignments are displayed as the default. An asterisk in the PC column indicates the primary care team for this patient. Click the ASSIGN TEAM button and then select the team to which you wish to assign the patient.

A patient may be assigned to more than one panel on a given day as long as the patient un-assignment from all other primary care provider panels is completed on the same day.

4. The Team - Position Assignments screen appears. On the Team Assignment tab, check the Primary Care Team and Restrict Consults check boxes as appropriate. Change the Date Assigned if necessary. Click the SAVE button. Enter the information on the Position Assignments tab (see POSITION ASSIGNMENTS TAB).

Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen
Team Assignment Tab



Field Descriptions

Dates

***Assigned**
The date the patient is assigned to the team. Default will be today.

Discharged
The date the patient is discharged from the team.

Discharge Reason (Drop down list)
Click this to select a reason when discharging a patient. **NOTE:** Automatic reasons (Deceased and Automatic Inactivation) are set during automatic discharges and are not selectable by the user.

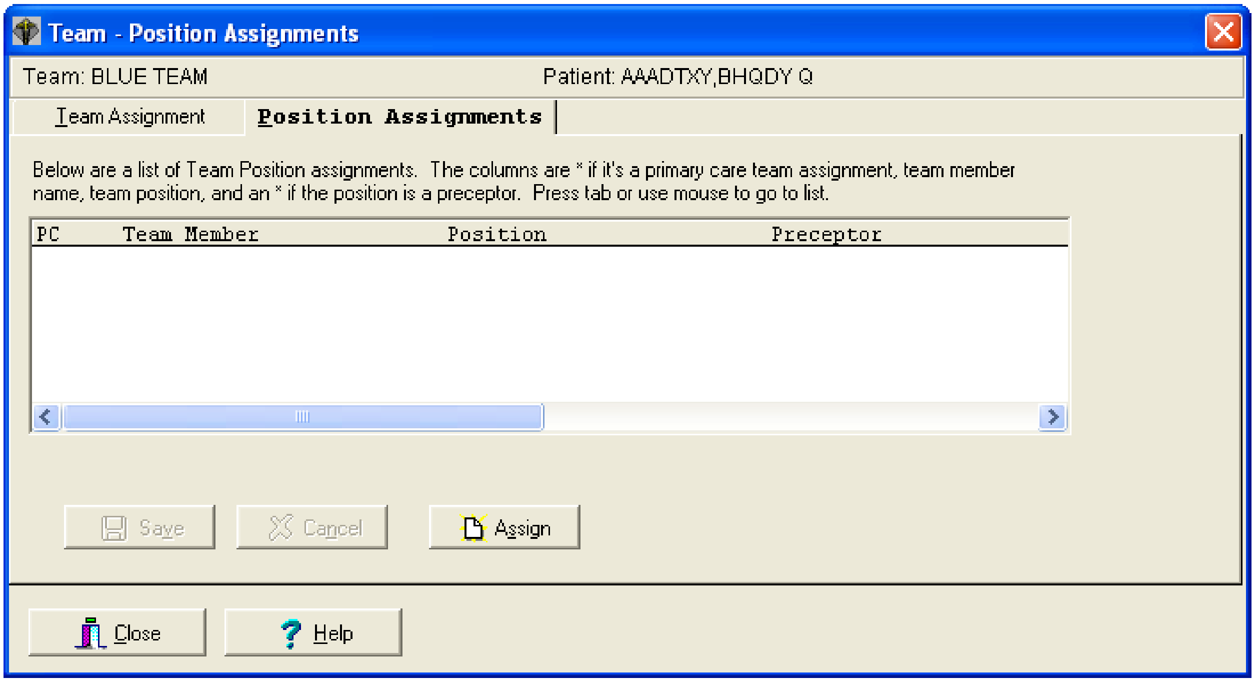
Primary Care Team for this Patient? (Check box)
Check this box if this team will be the primary care team for this patient. Patients may have only one team designated as their primary care team.

Patient Has Multiple PCPs (Check box)
Check this box if the patient is allowed to have multiple PCPs. Be sure to follow the Business Rules for allowing multiple PCPS.

Restrict Consults for this Patient? (Check box)
Check this box if you wish to restrict consults for this particular patient. This is only applicable to teams where consults are not restricted for the entire team.

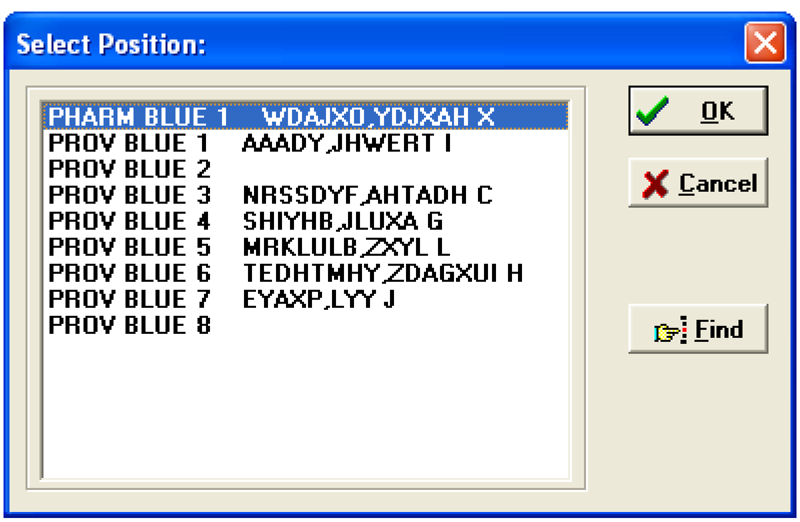
Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen
Position Assignments Tab



The Position Assignments tab displays existing assignments to positions on the selected team. The PC column will contain an asterisk to identify primary care provider positions and an x to identify associate provider positions. Other data provided includes position name, standard role, staff member, and whether or not the position can act as a preceptor.

1. Click the ASSIGN button. From the Select Position dialog box, choose the position you are assigning the patient to and click OK.



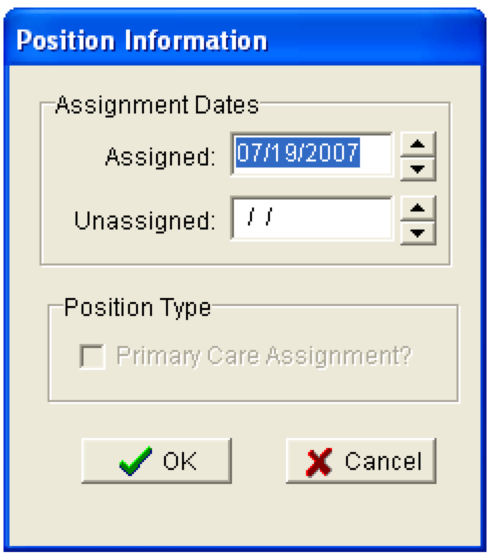
Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen - Position Assignments Tab

2. The Position Information dialog box appears. Edit the assignment date and position type, if necessary. Click OK. Then click the SAVE button on the Position Assignments tab.

If the position has been associated with a clinic and the patient is not already enrolled there, you will now be asked if you want to enroll the patient in that clinic. If you answer YES, you will be asked if this is an outpatient enrollment. If you answer NO to outpatient enrollment, the enrollment will automatically be an ambulatory care enrollment.

3. If you wish to assign this patient to another position on this team, click the right mouse button and select “new position”. See Step 2.



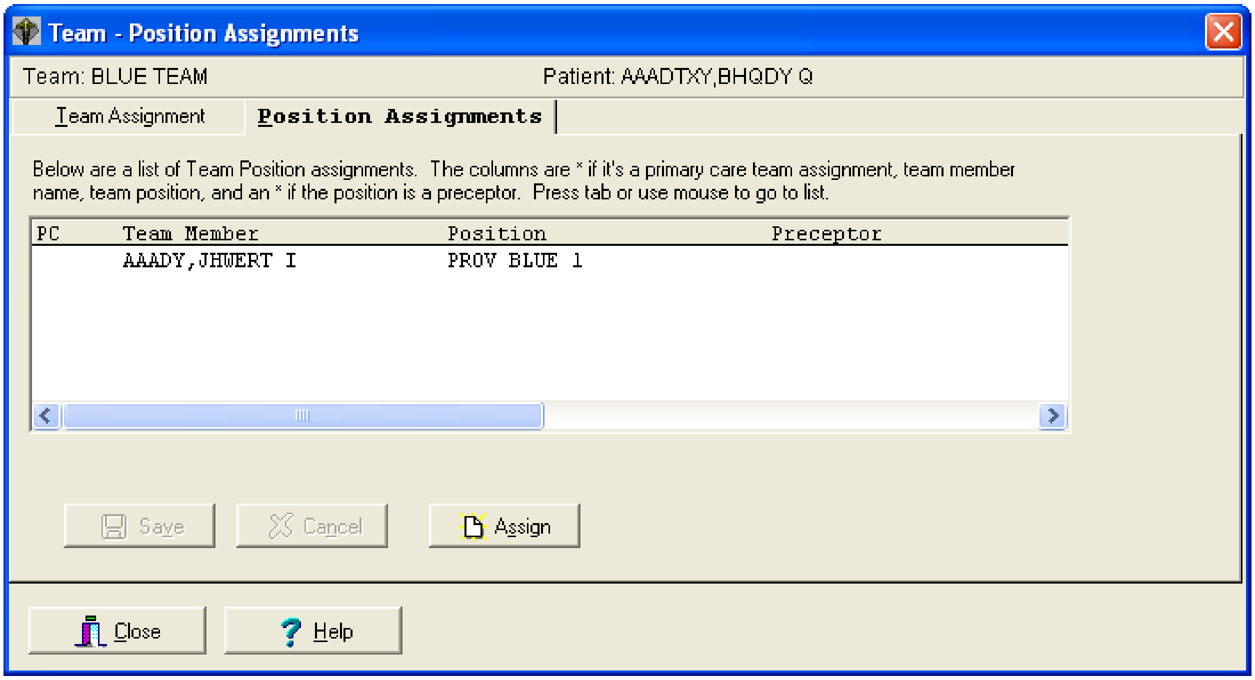
***Assignment Dates**
Enter the date you are assigning the patient to the position.

Position Type

Primary Care Assignment? (check box)
Check the box if this is a primary care assignment.

Assign Single Patient to Team/Position(s)

Team – Position Assignments Screen - Position Assignments Tab

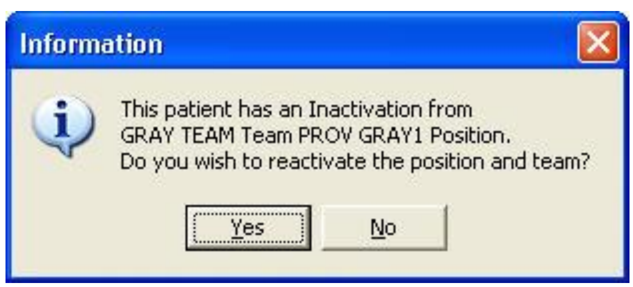


Patient Reactivation of an Automatically Inactivated Patient

The Reactivate button will be enabled if the patient had an automatic inactivation by the system. It is provided for easy reactivation of a patient to their previous team and position.

1. Click Reactivate button.

2. A message box will appear showing the previously deactivated team and position and will confirm that you would like to reactivate the patient to the previous team and position (see image below).



3. Click Yes to confirm and reactivate the patient. This reactivates the original team and position assignment, keeping the original assigned date and removing the discharged date to reactivate the old assignment.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|TEAM ASSIGNMENT menu bar command.

2. Select a team through the Select Team To Assign To dialog box.

3. The Multiple Patient Assignments to Team form appears. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.

4. From the *Select Patients by* drop down list, choose the method of patient selection. If your selection method is *PC Assignment with No Team*, click the GET LIST button and then enter the effective date. Go to Step 6.

5. Select the *clinic/stop code/clinic appointment/team* from the drop down list.

If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method was stop code or clinic appointment, you will be asked for a date range.

If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

6. Make your patient selections by clicking on the name.

NOTE: The lists of patients, which currently appear in the Available to Assign and New Assignments boxes, may be printed to a local (non-VistA) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

Assign Multiple Patients to Team/Position(s)

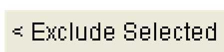
TEAM ASSIGNMENT

7. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.



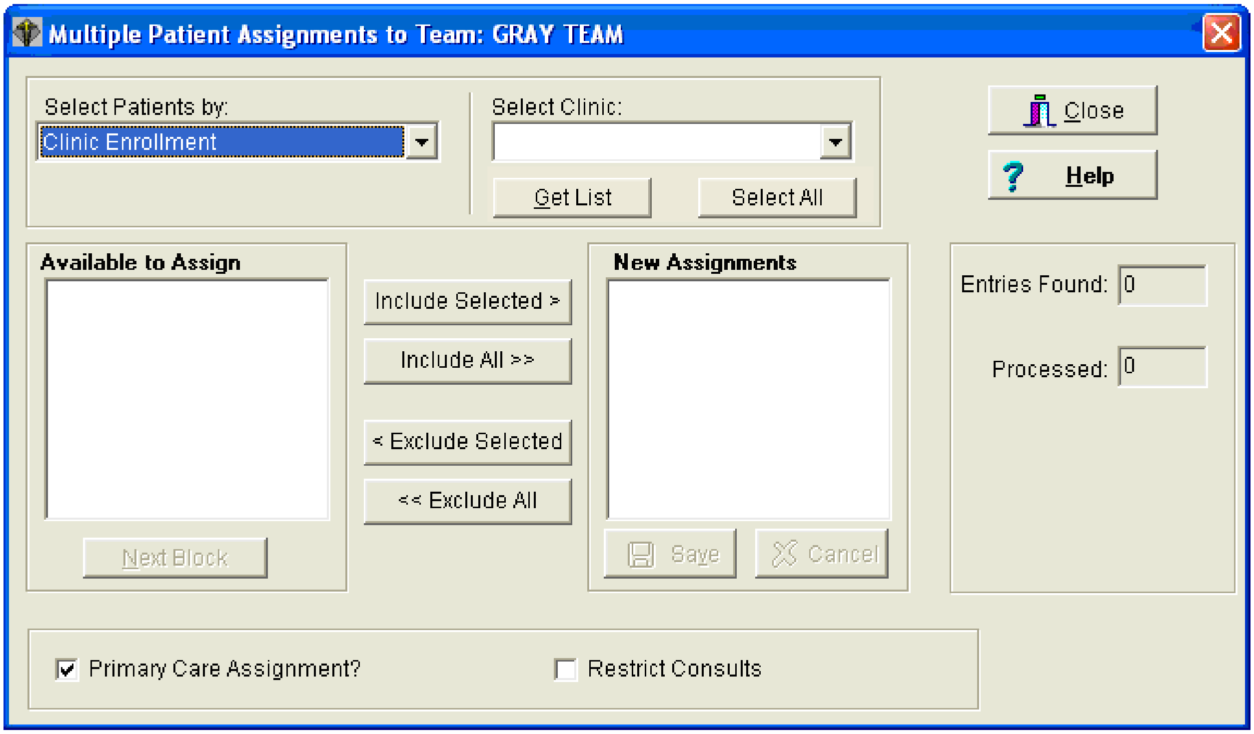
Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

8. Click the SAVE button. The selected patients are now assigned to the selected team.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT



Field Descriptions

Select Patients by (drop down list)
You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, or pc assignment with no team.

Select Clinic {patient selection method} (drop down list)
Choose the clinic, stop code, clinic appointment, or team from which you wish to assign patients.

Available to Assign (list box)
Contains names of patients who are available to be assigned to the selected team.

Next Block (button)
The Available to Assign list box contains a maximum of 200 names in the displayed block. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

New Assignments (list box)
Contains names of patients who will be assigned to the selected team once the SAVE button is clicked.

Assign Multiple Patients to Team/Position(s)

TEAM ASSIGNMENT

Entries Found (numeric display)
Displays the total number of entries found matching the selection criteria.

Entries Processed (numeric display)
Once the assignment is made and saved, the number of entries processed will be displayed.

Primary Care Assignment (check box)
Check this box if this team is to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

1. Select the PATIENT|MULTIPLE ASSIGNMENTS|POSITION ASSIGNMENT menu bar command.

2. Select a team through the Select Team To Assign To dialog box.

3. Select a position through the Select Position in Team dialog box.

4. The Multiple Patient Assignments to: {Position in Team} form appears. Check the Primary Care Assignment check box on the bottom of the form, if applicable.

5. From the *Select Patients by* drop down list, choose the method of patient selection. If your selection method is *PC Assignment with No Team,* click the GET LIST button and then enter the effective date. Go to Step 7.

> **5a.** If you choose the "position enrollment" method of patient selection, the Select Team dialog box will appear.
>
> - To assign patients from one position to another position on the same team, select the team chosen at Step 2.
> - To assign patients from a position on one team to a position on another team, select the team **from** which you wish to assign patients.

6. Select the *clinic/stop code/clinic appointment/team/position* from the drop down list.

> If you click the GET LIST button, patient names will appear in the *Available to Assign* box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names. If your selection method is stop code or clinic appointment, you will be asked for a date range.
>
> If you click the SELECT ALL button, you will get a confirmation box asking if you want to select all patients. If you click YES, all patients will **automatically** be assigned. No entries will appear in either list box and you do not need to proceed further.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

7. Make your patient selections by clicking on the name.

NOTE: The lists of patients which currently appear in the Available to Assign and New Assignments boxes may be printed to a local (non-VistA) printer via a popup menu. Access the popup menu by clicking the right mouse (with the cursor inside the box) while the list is active.

8. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

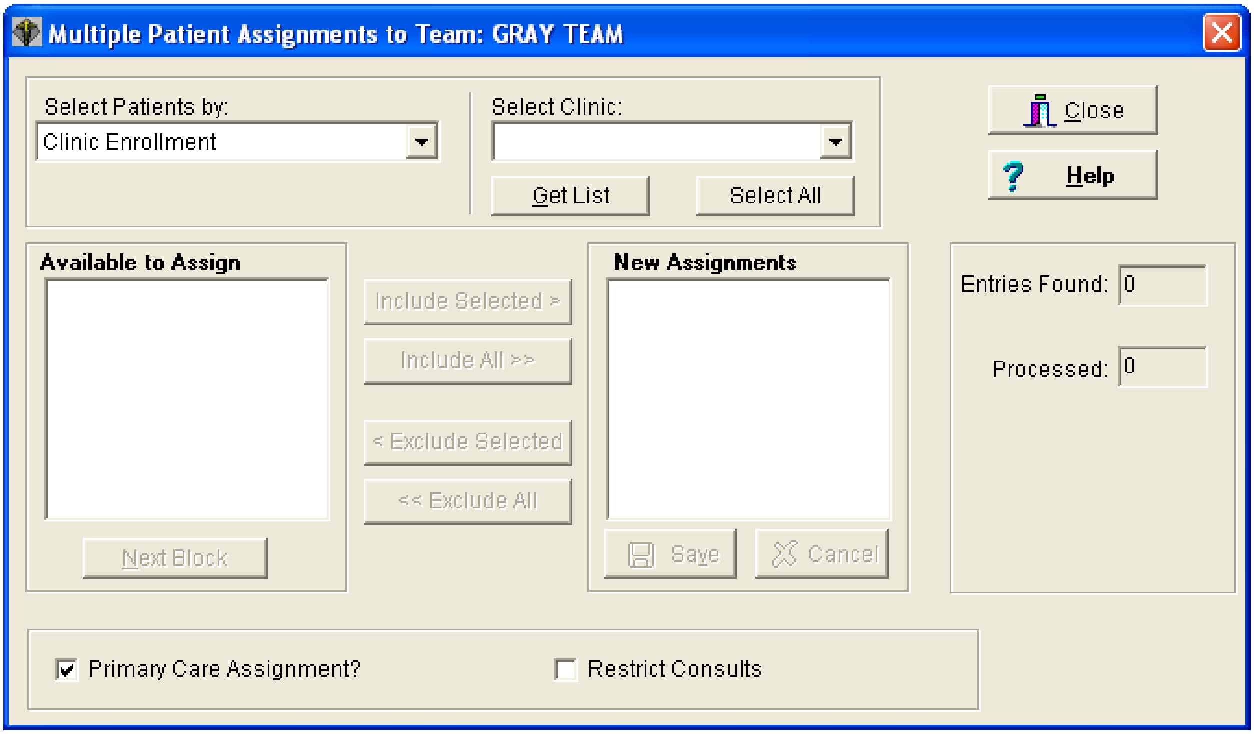
Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

9. Click the SAVE button. The selected patients are now assigned to the selected position.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT



Field Descriptions

Select Patients by (drop down list)
You may choose to select the patients by clinic enrollment, stop code (active stop codes only), appointments, team enrollment, position enrollment, or pc assignment with no team.

Select {patient selection method} (drop down list)
Choose the clinic, stop code, clinic appointment, team, or position from which you wish to assign patients.

Available to Assign (list box)
Contains names of patients who are available to be assigned to the selected position.

Next Block (button)
The Available to Assign list box contains a maximum of 200 names in the displayed block. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

Assign Multiple Patients to Team/Position(s)

POSITION ASSIGNMENT

New Assignments (list box)
Contains names of patients who will be assigned to the selected position once the SAVE button is clicked.

Entries Found (numeric display)
Displays the total number of entries found matching the selection criteria.

Entries Processed (numeric display)
Once the assignment is made and saved, the number of entries processed will be displayed.

Primary Care Assignment (check box)
Click in this box if the position you are assigning to is a primary care position for these patients. The position must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which this team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|TEAM REASSIGNMENT menu bar command.

2. The Multiple Patient Team Reassignment form appears. Click on the *Options [PC Assign]* tab. Check the Primary Care Assignment and Restrict Consults check boxes if applicable.

3. Click on the *Reassign* tab. From the *FROM Team* drop down list, select the team **from** which you are reassigning patients. From the *TO Team* drop down list, select the team **to** which you are reassigning patients. Patient names will appear in the *Available to Assign* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

4. Make your patient selections by clicking on the name.

5. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

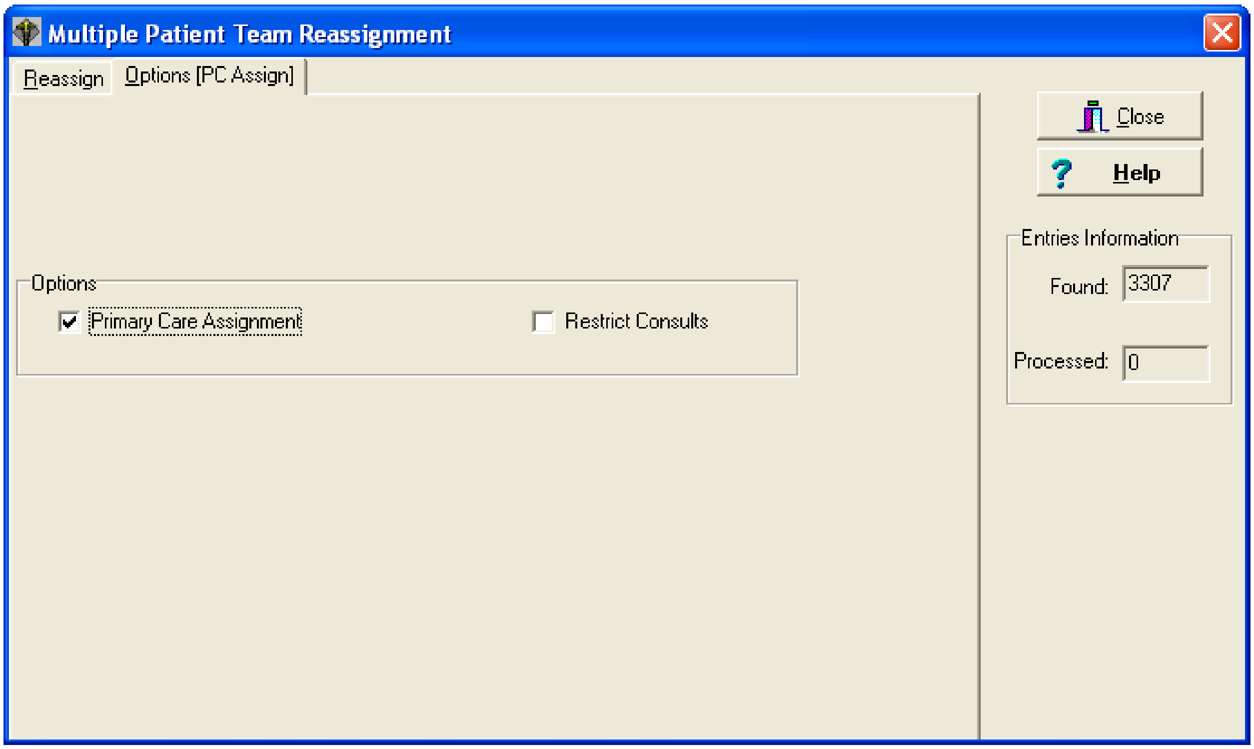
Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

6. Click the SAVE button. The selected patients are now reassigned to the selected team. Information concerning patients who were not reassigned will be provided to the user via a new MailMan message.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Multiple Patient Team Reassignment Screen



Field Descriptions

Entries Information

Found (numeric display)
Displays the total number of entries found matching the selection criteria.

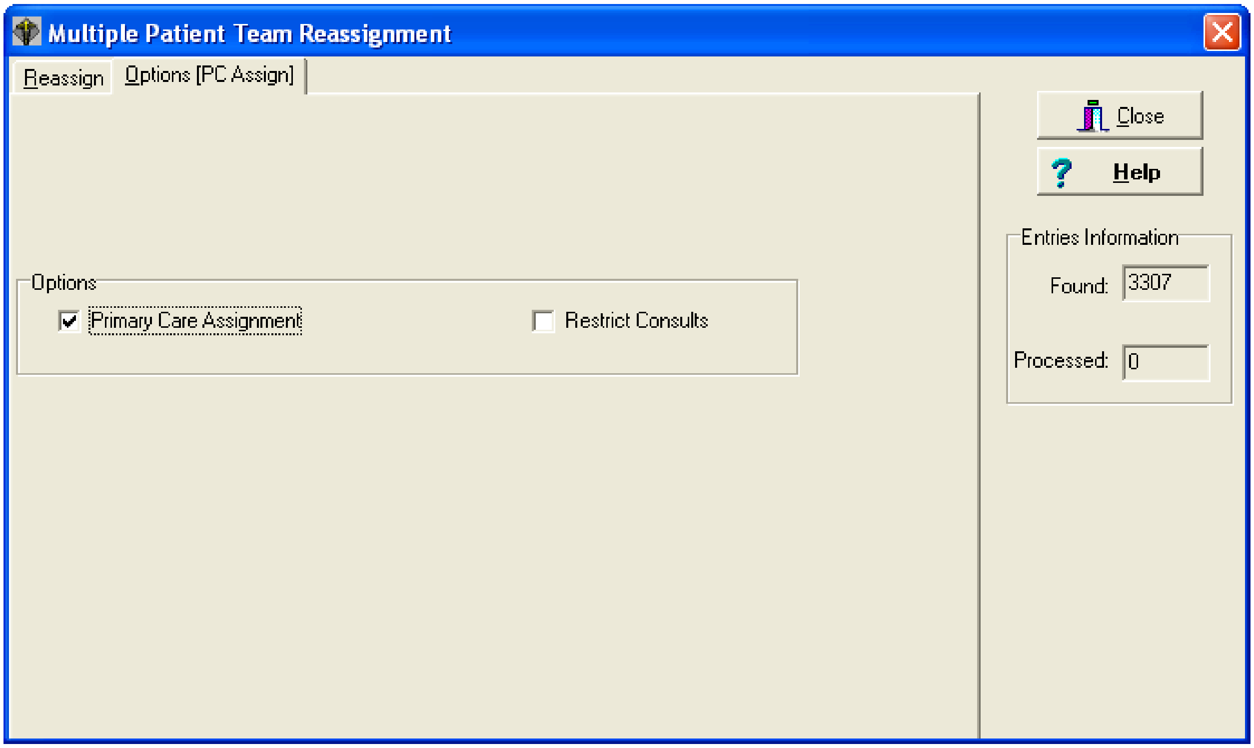
Processed (numeric display)
Once the assignment is made and saved, the number of entries processed will be displayed.

NOTE: When utilizing multiple patient reassignment, the system refreshes the patient count incrementally in the team setting. You may not see all the patients reassigned immediately. The system will continually refresh until all selected patients have been transferred and the appropriate numbers are displayed.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Multiple Patient Team Reassignment Screen
Options [PC Assign] Tab



Options

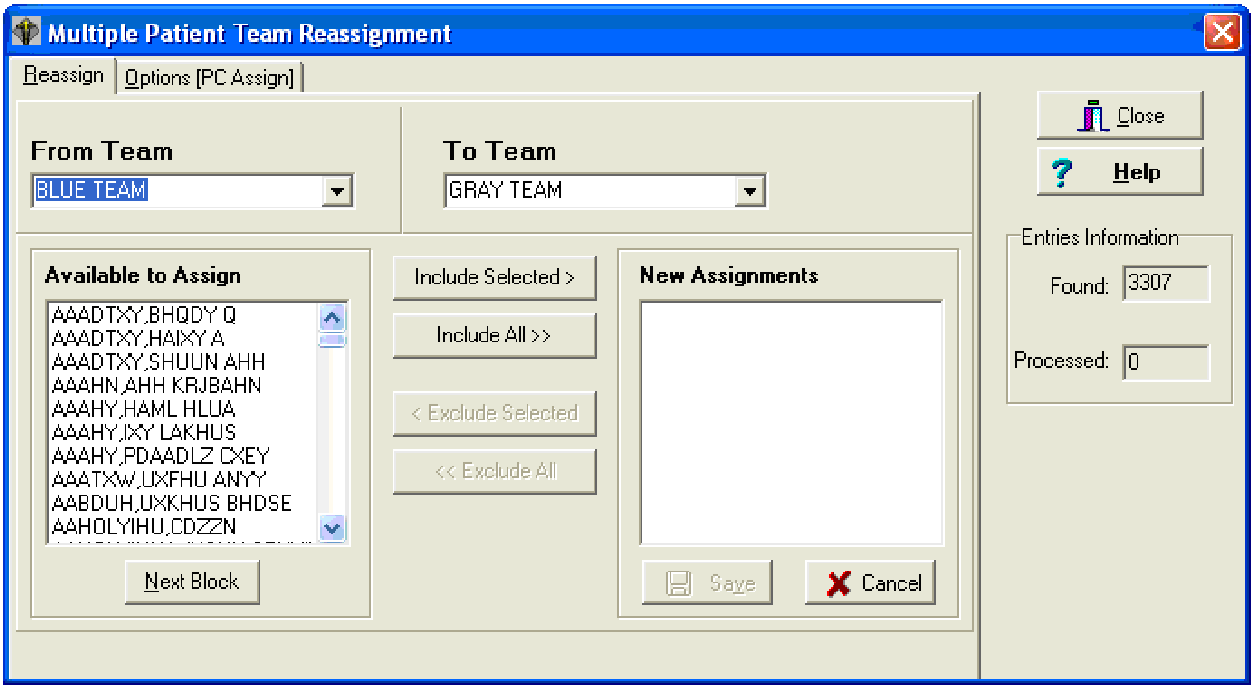
Primary Care Assignment (check box)
Check this box if you want the *To* team to be the primary care team for these patients. The team must be able to provide primary care.

Restrict Consults (check box)
Click in this box to prevent users from making consult appointments to clinics in which the *To* team's patients are not enrolled. Patients who are listed as “restrict consults” may only be enrolled in a new clinic if the user has the SC CONSULT security key. Consult appointments (an appointment where the patient is not enrolled in the clinic) may only be done via the new Make Consult Appointment option (option requires security key). A MailMan message will be generated whenever a patient whose consults are restricted receives a consult appointment or is enrolled in a new clinic.

Reassign Multiple Patients to Team/Position(s)

TEAM REASSIGNMENT

Multiple Patient Team Reassignment Screen
Reassign Tab



From Team (drop down list)
Select the team from which you wish to reassign patients.

To Team (drop down list)
Select the team to which you wish to reassign patients.

Available to Assign (list box)
Contains names of patients who are available to be reassigned to the selected *To* team.

Next Block (button)
The Available to Assign list box contains a maximum of 200 names in the displayed block, if the NEXT BLOCK button is enabled, you may click it to see the next block of names.

New Assignments (list box)
Contains names of patients who will be reassigned to the selected *To* team once the SAVE button is clicked.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

1. Select the PATIENT|MULTIPLE REASSIGNMENTS|POSITION REASSIGNMENT menu bar command. The Multiple Patient Position Reassignment form appears.

2. Click on the *Options [PC Assign]* tab. Check the desired radio button under *Assignment Status* and select the date/date range under *Assignment Dates* if applicable. Check the *Primary Care Assignment* check box if applicable.

3. Click on the *Reassign* tab. Select a team from the *FROM Team* drop down list and a position from the *FROM Position* drop down list. Patient names will appear in the *Available to Assign* list box in maximum blocks of 200. If the NEXT BLOCK button is enabled, you may click it to see the next block of names.

4. Select a team from the *TO Team* drop down list and a position from the *TO Position* drop down list.

5. Make your patient selections by clicking on the name.

6. Move your selections from the *Available to Assign* list box to the *New Assignments* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

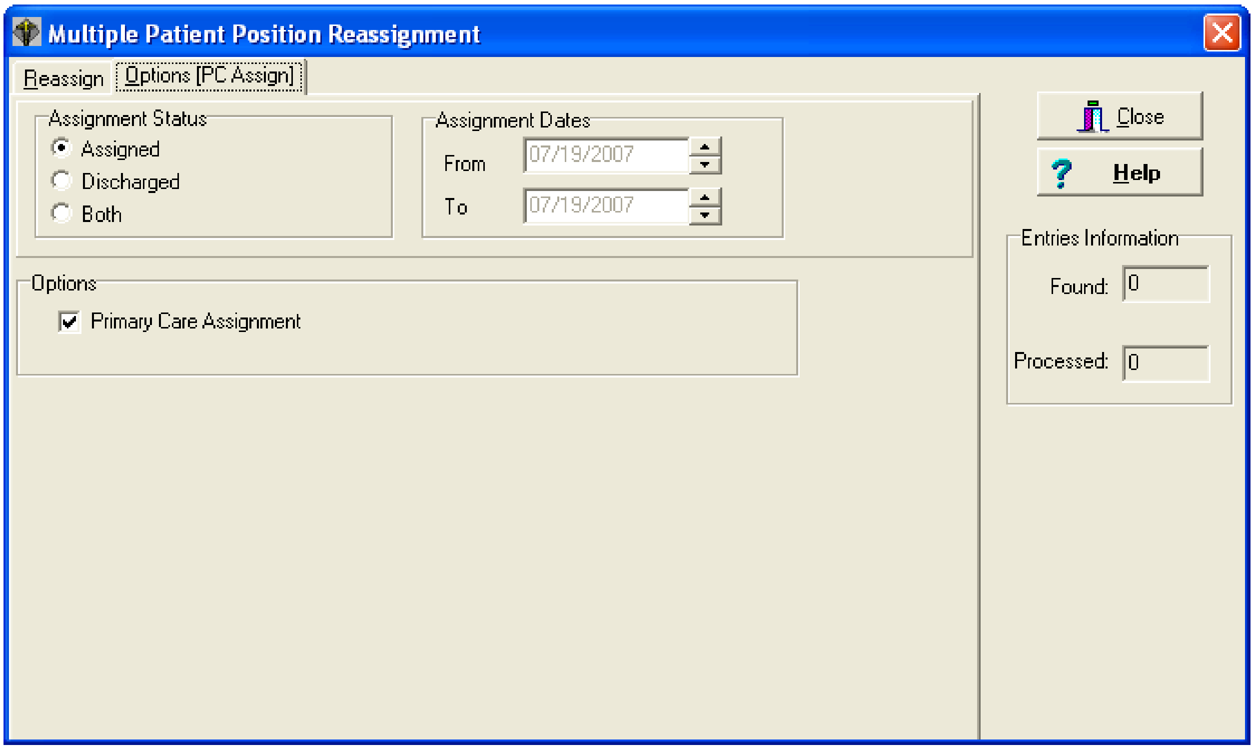
Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

7. Click the SAVE button. The selected patients are now reassigned to the selected team and position. Information concerning patients who were not reassigned will be provided to the user (and to members of the PCMM Reassignment Mail Group) via a new MailMan message.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen



Field Descriptions

Entries Information

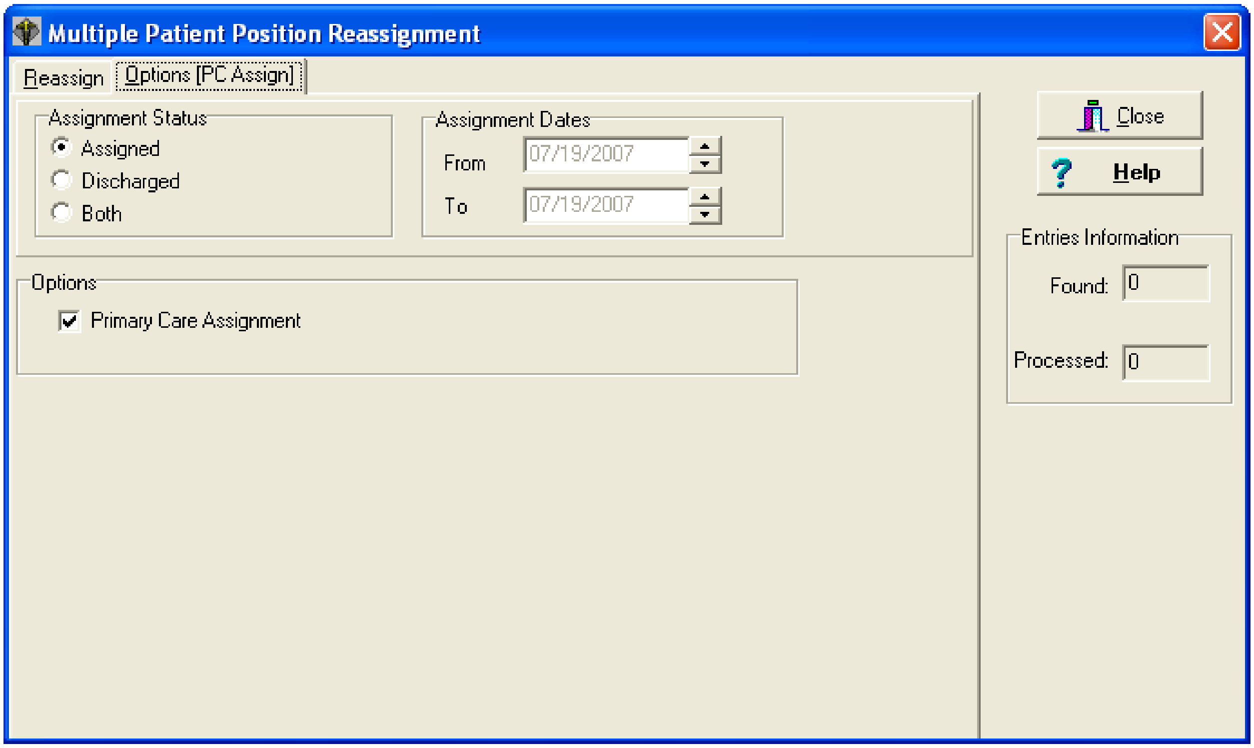
Found (numeric display)
Displays the total number of entries found matching the selection criteria.

Processed (numeric display)
Once the assignment is made and saved, the number of entries processed will be displayed.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen
Options [PC Assign] Tab



Field Descriptions

Assignment Status (radio button)
Select the assignment status for the list of patients which will appear in the FROM Position list box.

Assigned - Patients currently assigned to the selected FROM position.
Discharged - Patients who have been discharged from the selected FROM position.
Both - Patients in both the Assigned and Discharged categories.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen - Options [PC Assign] Tab

Assignment Dates
Select the date or date range for the selected assignment status.

If Assignment Status is	
Assigned	Date range will not be enabled.
Discharged	Both *from* and *to* date fields will be enabled.
Both	Only *from* date field will be enabled. Range will be to current date.

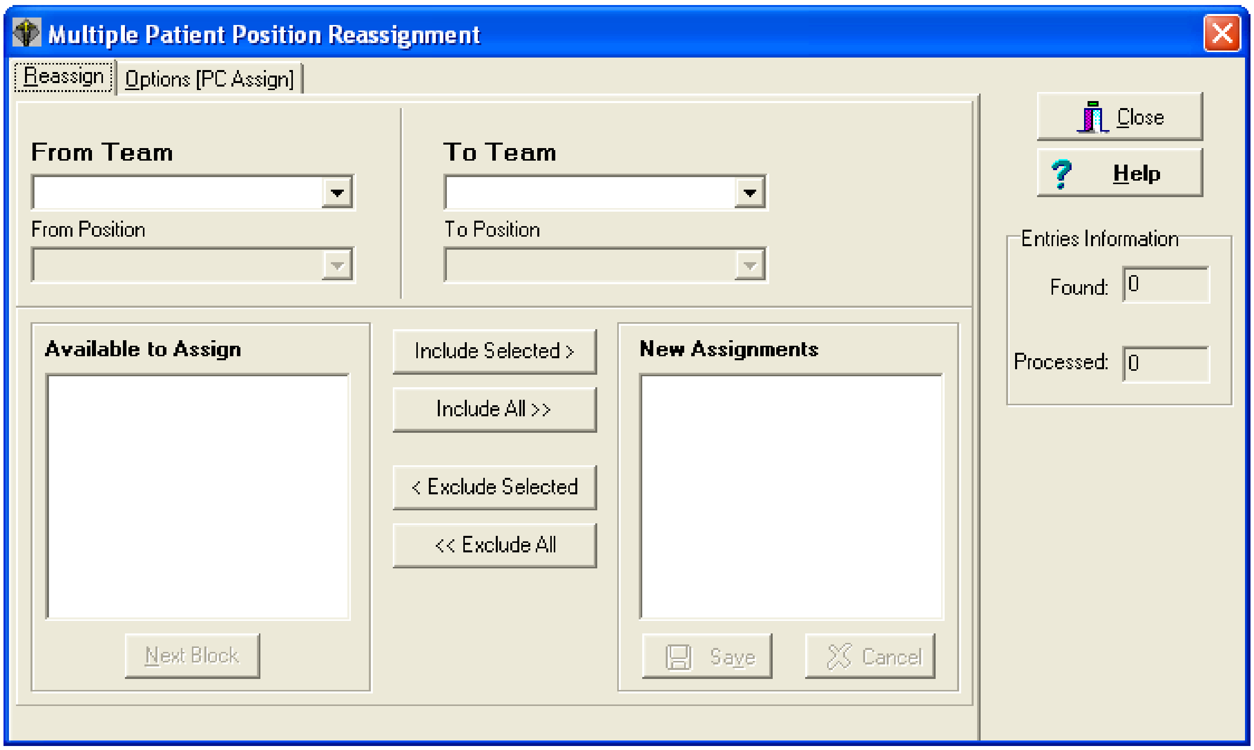
Options

Primary Care Assignment (check box)
Click in this box if the position you are assigning to is a primary care position for these patients.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen
Reassign Tab



Field Descriptions

From Team (drop down list)
Select the team from which you wish to reassign patients.

From Position (drop down list)
Select the position from which you wish to reassign patients.

To Team (drop down list)
Select the team to which you wish to reassign patients.

To Position (drop down list)
Select the position to which you wish to reassign patients.

Available to Assign (list box)
Contains names of patients who are available to be reassigned to the selected *To* team and position.

Reassign Multiple Patients to Team/Position(s)

POSITION REASSIGNMENT

Multiple Patient Position Reassignment Screen - Reassign Tab

Next Block (button)
The Available to Assign list box contains a maximum of 200 names in the displayed block, if the NEXT BLOCK button is enabled, you may click it to see the next block of names.

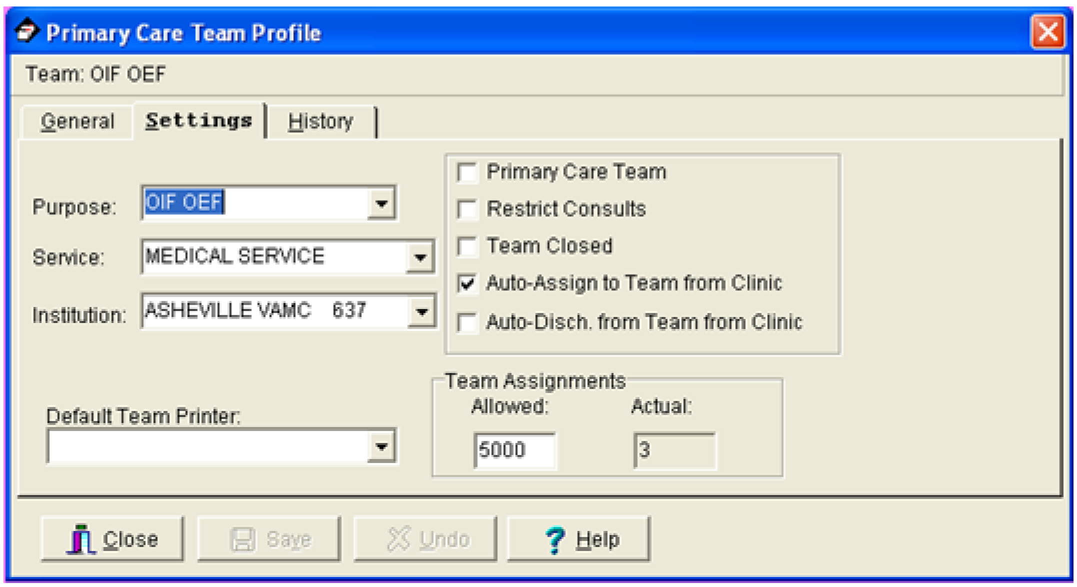
New Assignments (list box)
Contains names of patients who will be reassigned to the selected *To* team and position once the SAVE button is clicked.

Setting up OIF/OEF Teams

To assist in the timely treatment of seriously ill Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF) veterans, the VA has established Transition Patient Advocates (TPA) in most VA facilities. Facilities are setting up PCMM non-primary care teams to help identify and track these OIF/OEF patients.

When setting up the new OIF/OEF, follow the same procedure for setting up the Primary Care teams. There may be only one OIF/OEF team per site.

Select OIF/OEF as the Team Purpose and uncheck the Primary care box.



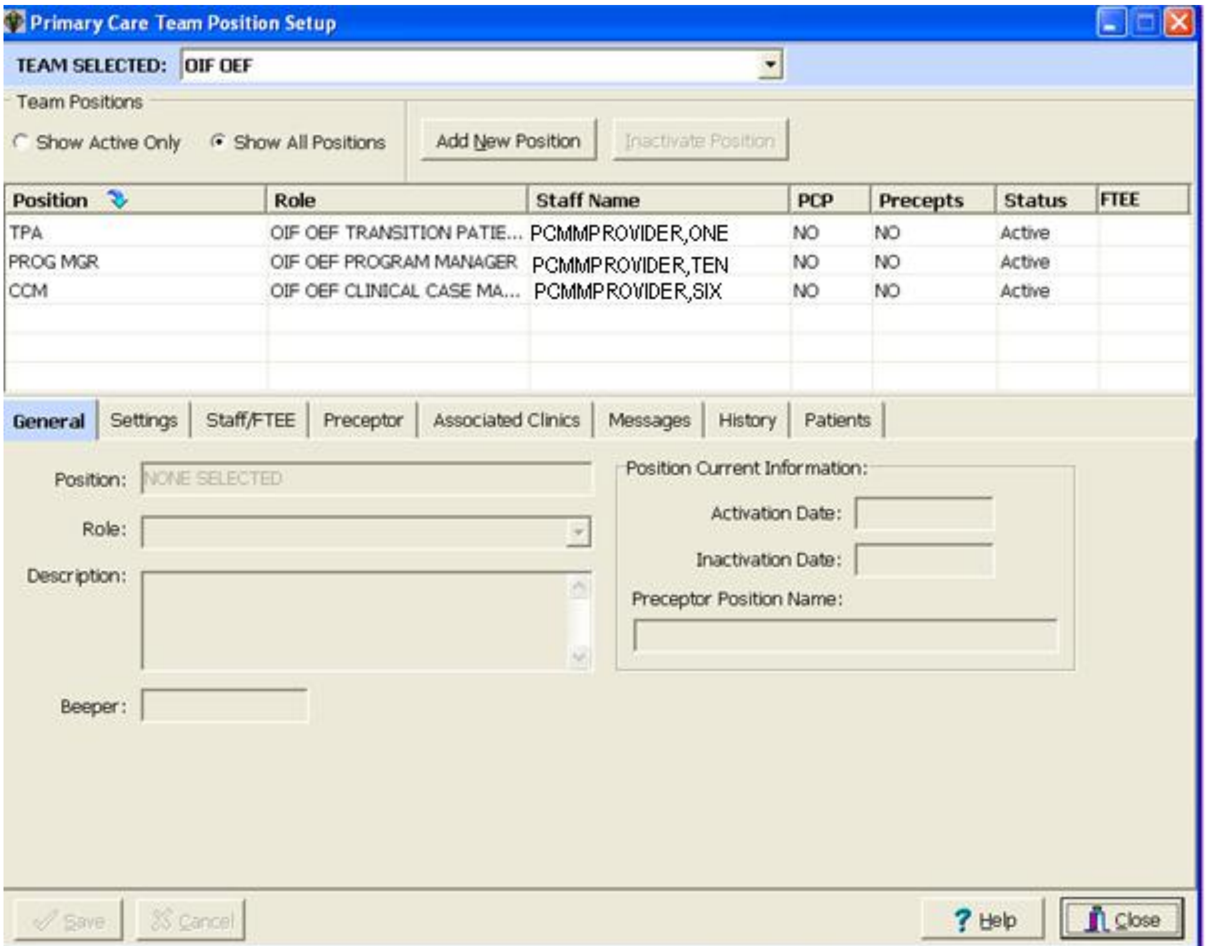
Fill in the other required team fields with the information appropriate for your site.

Setting up OIF/OEF Teams

Enter the names of the positions according to your facility's instructions and select the appropriate role from the list box.

Only the following roles are allowed on the OIF/OEF team.

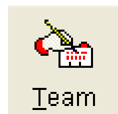
OIF/OEF Transition Patient Advocate (TPA)
OIF/OEF Clinical Case Manager (CCM)
OIF/OEF Program Manager (PM)



Fill in the other required position fields with the information appropriate for your site.

Edit an Existing Team

Team Setup

1. Click on the Team Setup toolbar speed button 

or select the TEAM|SETUP menu bar command.

2. Select the team you wish to edit from the Select Team dialog box and click the OK button.

3. Enter the correct information on the General or Settings tabs of the Primary Care Team Profile form. Click the SAVE button after editing for the data to be stored.

4. To inactivate the selected team, first click the ADD button on the History tab. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information. A warning message appears when attempting to inactivate a team with active assignments on or after the inactivation date.

Position Setup

These steps cover editing of an existing position. If you are assigning a new position to a team, see "Assign Positions to a Team" under Team Setup.

1. Click on the Position Setup toolbar speed button 

or select the TEAM|POSITIONS menu bar command.

2. Select the team whose positions you wish to edit from the Select Team dialog box and click the OK button.

3. Double click the position you wish to edit from the Teams Position list box on the Primary Care Team Position Setup form. Enter the correct information on the General, Settings, or Messages tabs. Click the SAVE button after editing for the data to be stored.

4. To inactivate the selected position, first click the ADD button on the History tab. After all data is entered, the OK button becomes enabled. Click the OK button to add the new entry to the History Log and store the information. A warning message appears when attempting to inactivate a position with active assignments on or after the inactivation date.

Staff Assignment

(For positions that are NOT part of a preceptor link)

These steps cover editing where a staff member has already been assigned to a position. If you are initially assigning a staff member to a position, see "Assign Staff Member to a Position (For positions that are NOT part of a preceptor link)" under Team Setup.

1. Select the TEAM|ASSIGN STAFF menu bar command.

2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.

3. Select the position you want to edit from the Select Position in Team dialog box and click OK. The Staff Assignment Add/Edit form appears.

4. To inactivate the current assignment, click the INACTIVATE button **or** click the right mouse button and select "Inactivate Current Member" **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button.

5. To assign a new staff member, click the ASSIGN button **or** click the right mouse button and select "Assign Member" **or** choose the EDIT|ASSIGN MEMBER menu bar command.

6. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected.

7. Entry of FTEE for this position is required if it is the PCP position, otherwise it is optional.

8. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

Staff Assignment

(For positions that ARE part of a preceptor link)

These steps cover editing where a staff member has already been assigned to a position that is part of a preceptor link. If you are initially assigning a staff member to a position, see "Assign Staff Member to a Position (For positions that ARE part of a preceptor link)" under Team Setup.

1. Select the TEAM|POSITIONS menu bar command.

2. Select the team whose staff you wish to edit from the Select Team dialog box and click the OK button.

3. Select the position you want to edit from the Primary Care Team Position Setup form and then click on the Staff/FTEE button. The Staff Assignment Add/Edit form appears.

4. To inactivate the current assignment, click the INACTIVATE button **or** click the right mouse button and select "Inactivate Current Member" **or** choose the EDIT|INACTIVATE CURRENT ASSIGNMENT menu bar command. Edit the effective date and status reason fields, if necessary. Click the SAVE button. If you inactivate a staff assignment for a position that is a current preceptor for another position and attempt to close the Staff Assignment Add/Edit form without creating a current staff assignment, your inactivation change will not be saved.

5. To assign a new staff member, click the ASSIGN button **or** click the right mouse button and select "Assign Member" **or** choose the EDIT|ASSIGN MEMBER menu bar command.

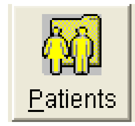
6. The Staff Lookup dialog box appears. Type the staff member name (last, first) and click the SEARCH button. Possible matches appear in the list box. Make your selection and click OK. If the User Classification appears as part of the title bar, you may type a question mark in the lookup box for a listing of all available entries in that User Class. Only names of staff members assigned to that User Class will appear. If the User Class is turned off at your site, any staff member may be selected. Staff members currently assigned to a preceptor or precepted positions on the team may not be selectable depending on the type of position to which an assignment is being made.

7. Entry of FTEE for this position. is required if it is the PCP position, otherwise it is optional.

8. Edit the effective date and status reason fields, if necessary. Click the SAVE button. Close the form.

Single Patient Assignment

These steps cover editing where a patient has already been assigned to a team and/or position. If you are initially assigning a patient to a team/position, see "Assign Single Patient to Team/Position(s)" under Team Setup.

1. Click on the Assign Patients toolbar speed button 

or select the PATIENT|PATIENT ASSIGNMENT menu bar command.

2. The Patient Lookup dialog box appears. Type the patient name (last, first) and click the SEARCH button. If there is more than one match, possible matches will appear in the list box. Double click your selection **or** single click then click the SELECT button. Employee patients will display "sensitive" in the DOB and SSN columns. Accessing a sensitive patient record can trigger messages and bulletins being sent. If there is another patient with the same last name and same last four digits of the SSN as the selected patient, a warning message will appear to ensure you have selected the correct patient. If the selected patient requires a Means Test, a message will be displayed.

3. The Select Patient-Team Assignment form appears. Based on whether or not the SHOW ALL TEAM ASSIGNMENTS menu bar command is selected, all team assignments or only current assignments will appear in the list box. An asterisk in the PC column indicates the primary care team for this patient. If the patient is assigned to more than one team, click on the team for which you wish to edit patient assignment. Click the EDIT TEAM button.

4. **Team Assignment -** If necessary, edit the primary care team and restrict consults fields on the Team Assignment tab and click the SAVE button. To discharge a patient from a team, enter the date of discharge. Tab off the field and click the SAVE button. If the patient is assigned to positions on the team, the Review Active Positions dialog box will now appear. Clicking the DISCHARGE button will automatically enter the same discharge date for the associated active positions. Clicking the CANCEL button will cause the just entered date of discharge to be deleted. This action prevents patients being actively assigned to a position without having a team assignment

5. Position Assignment - To unassign an existing position assignment, double click on the position on the Position Assignment tab. The Position Information dialog box appears. Enter the unassigned date and click OK. Click the SAVE button. (History for this position assignment will remain.)

NOTE: If a patient has been assigned to a position in error (data entry error), the following steps should be taken. Click on the position. Select the EDIT|POSITION ASSIGNMENT|DELETE menu bar command. Confirm the deletion by clicking the OK button. You must hold the SC PCMM DELETE security key to perform this action. (History for this position assignment will be deleted.)

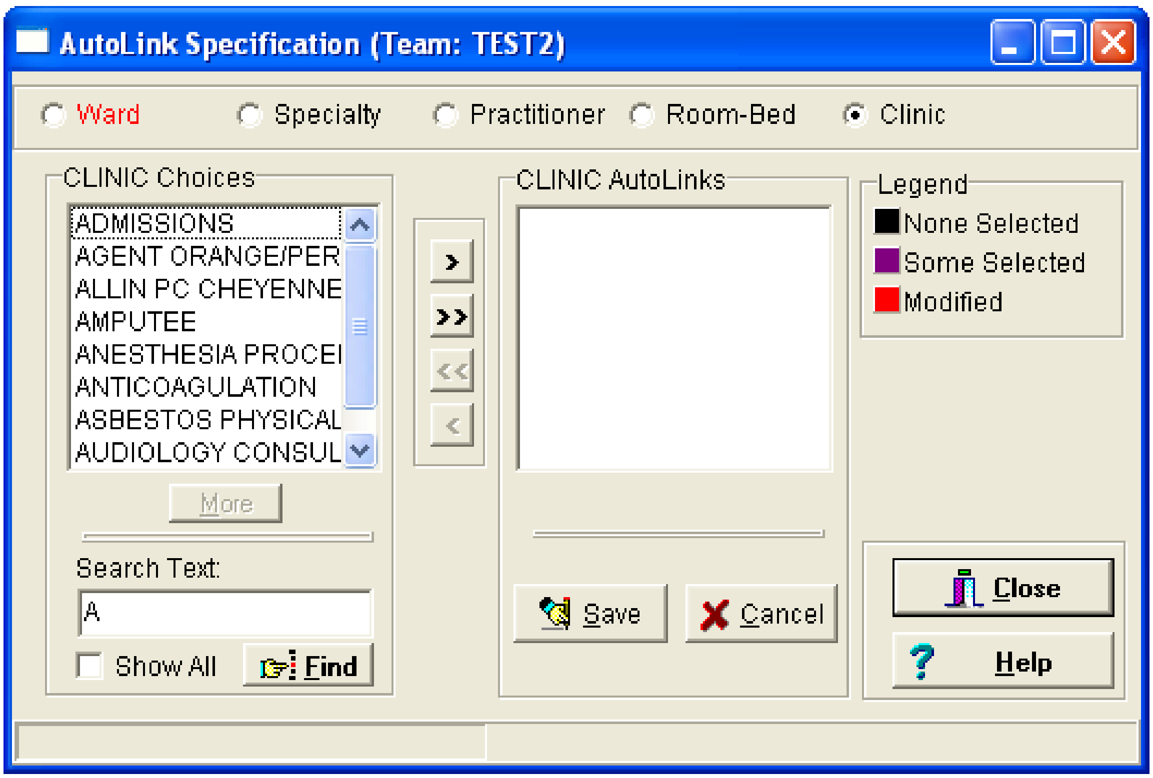
Creating Autolinks (functionality disabled)

If you have clicked on the Autolinks button on the General Tab of the Primary Care Team Profile form, begin at Step 3.

1. Select the TEAM|TEAM AUTOLINKS menu bar command.

2. Select a team through the Select Team Dialog Box.

3. The AutoLink Specification form appears. Choose the type of autolink from along the top of the form.



4. The *Choices* list box displays the entries for the selected item. You may click the SHOW ALL button to display all possible entries **or** type a few characters in the SEARCH box and click the FIND button for a limited selection. When first opened, the boxes default to A.

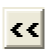
(This functionality has been disabled.)

5. Move your selections from the *Choices* list box to the *AutoLinks* list box by one of the following methods.

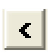
- Double clicking on an entry
- Click and drag
- Using the buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.



Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.



Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

6. Click the SAVE button to create the AutoLinks. (You may save after establishing the AutoLinks for each individual item or wait until links are established for all items.)

7. Repeat Steps 3 through 6 for each autolink type.

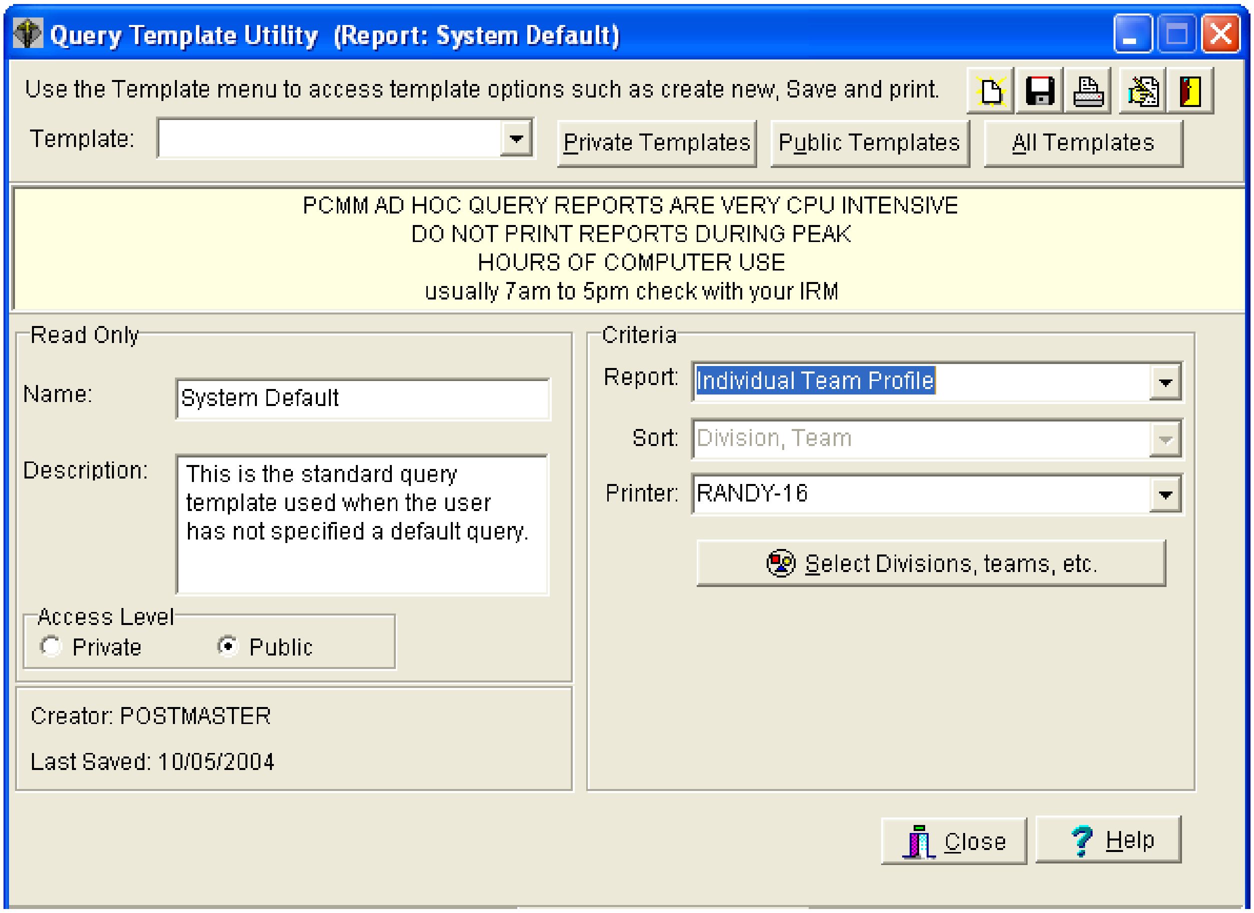
NOTE: To obtain link detail information on an entry, click on the entry from one of the list boxes. Right mouse click and choose “Details”.

Reports

Query Template Utility

The Query Template Utility is used to create report templates with a specified sort sequence and with specified category selections (divisions, teams, etc.). Templates may then be used to print the report in the future without having to make sort selections and category selections each time.

- Select REPORTS|SELECT REPORT menu bar command. The Query Template Utility form appears.



Query Template Utility

- Click the desired category button at top of form **or** choose the TEMPLATE|OPEN menu bar command to display the desired template type(s) in the drop down list.

Per (Personal) - your templates only
Pub (Public) - public templates only
All - both your personal and all public templates

Create a New Template

1. Click the Create a New Template toolbar speed button  on the Query Template Utility form or choose the TEMPLATE|NEW menu bar command.

2. Edit the Name text box and enter a description.

3. Assign either Private or Public access level to the template by clicking the correct radio button.

4. Enter the report criteria.

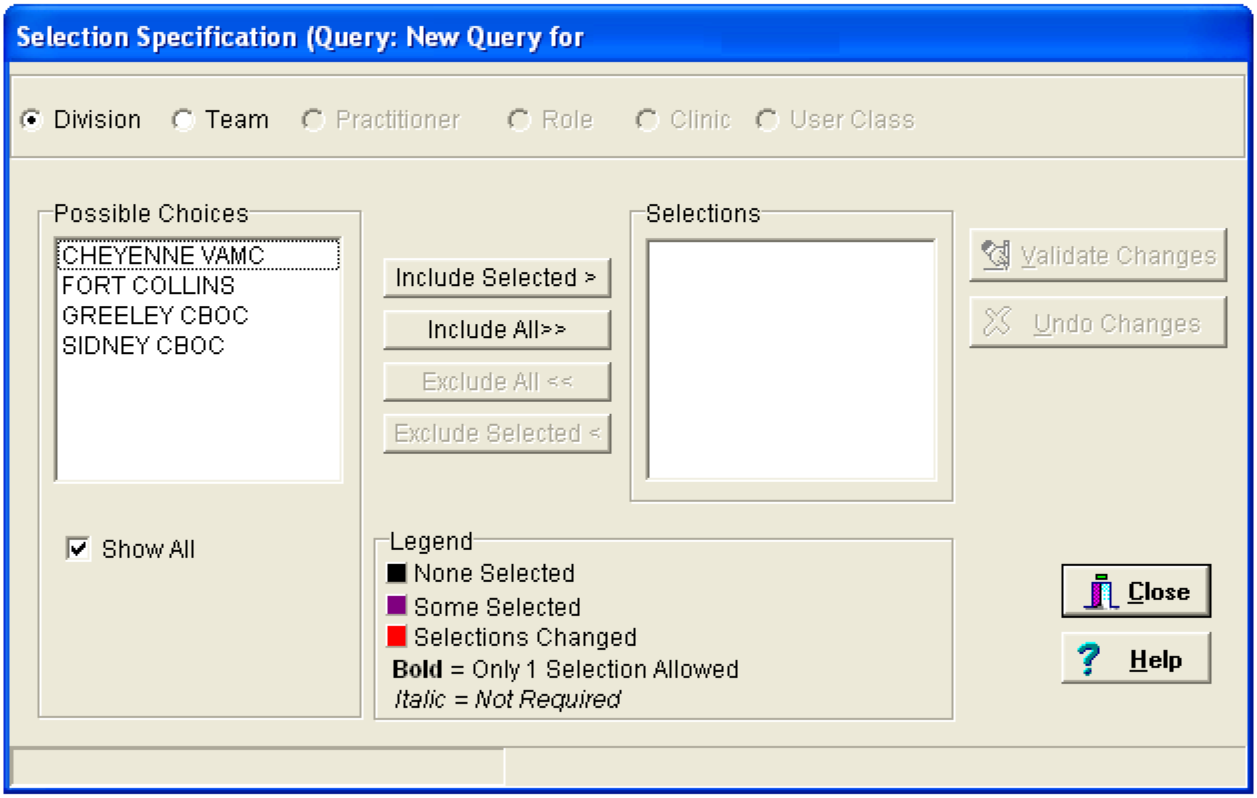
- Select the Report from the drop down list.
- If the Sort field is disabled, the default sort values will be used. If the Sort field is enabled, select the desired sort from the drop down list.
- Select the printer from the drop down list.
- In addition to the Sort and Printer fields, some reports have other unique data fields. These fields will appear below the Selections button on the form. (See Report Descriptions for a description of each available PCMM report and any unique fields.)

5. Click the Selections Button and enter the report specifications (divisions, teams, etc.). (*See Create a New Template - Report Specifications*). To obtain selection detail information on an entry, click on the entry from either of the list boxes. Right mouse click and choose “Details”.

6. If you wish to save this template after you have made and validated your selections, click the Save Template Changes toolbar speed button, or choose the TEMPLATE|SAVE menu bar command.

Query Template Utility

Create a New Template - Report Specifications



1. Choose the category along the top of the form for which you wish to select report specifications.

2. The *Possible Choices* list box displays the entries for the selected item. When first opened, the SHOW ALL field is checked which displays all possible entries. For a limited selection of entries, click the SHOW ALL check box to display the SEARCH box. Type a few characters in the SEARCH box and click the FIND button.

NOTE: If you have selected the Practitioner Demographics report, this form will appear differently. Since only one practitioner may be selected, the double arrow buttons are not visible. The SEARCH box appears instead of the SHOW ALL check box.

Query Template Utility

3. Move your selections from the *Possible Choices* list box to the *Selections* list box by one of the following methods.

- Double clicking on an entry
- Click and drag
- Using the buttons

Moves the selected items from the *Available to Assign* list box to the *New Assignments* list box.

Moves all the items currently in the *Available to Assign* list box to the *New Assignments* list box.

Moves the selected items from the *New Assignments* list box to the *Available to Assign* list box.

Moves all the items currently in the *New Assignments* list box to the *Available to Assign* list box

4. Repeat Steps 1 to 3 for each category.

5. Click the Validate button. The validation action checks the relationships between the category selections (teams associated with correct division, clinics associated with correct division, etc.). If validation cannot be made, you will receive an Error Report explaining the inconsistency. Close the form.

Modify an Existing Template

1. Select REPORTS|SELECT REPORT menu bar command

2. Select the template name from the drop down list.

3. Edit the report criteria.

4. Click the Selections button and edit the report specifications (divisions, teams, etc.). Be sure to validate your selections when complete. Close the form.

5. If you wish to save this template, click the Save Template Changes toolbar speed button or choose the TEMPLATE|SAVE menu bar command.

Query Template Utility

Printing Reports

Reports cannot be printed to the screen using the graphical user interface. They must be sent to a printer. These same reports may be printed to both the screen and to a printer through the Scheduling software.

To print a report from a template

1. Select the REPORTS|SELECT REPORTS menu bar command to open the Query Template Utility form.

2. Select the template name from the drop down list.

3. Click the Print Report toolbar speed button **or** choose the TEMPLATE|PRINT menu bar command.

4. If the Report Print dialog box appears, select the printer from the drop down list and click OK.

To print a report not set up in a template

1. Select the REPORTS|SELECT REPORTS menu bar command to open the Query Template Utility form.

2. Click the Create a New Template toolbar speed button.

3. Select the report name and report criteria (sort, printer, etc.).

4. Click the Selections button and choose the report specifications. Be sure to validate your selections when complete. Close the form.

5. Click the Print Report toolbar speed button **or** choose the TEMPLATE|PRINT menu bar command.

6. If the Report Print dialog box appears, select the printer from the drop down list and click OK.

Query Template Utility

Template Menu Bar Commands

Restore
Will restore the selected template values to what they were at the time of the last save.

Save As
Use the Save As function to save an existing query under a different name.
- Select the template name from the drop down list.
- Select the *Save As* menu bar command and rename the template. Change the description if desired.
- Follow Steps 3 through 5 under Modify an Existing Template.

Set Default
To set a template as your default value, select the template name from the drop down list and click the Set your Default Template to Current toolbar speed button **or** choose the *Set Default* menu bar command.

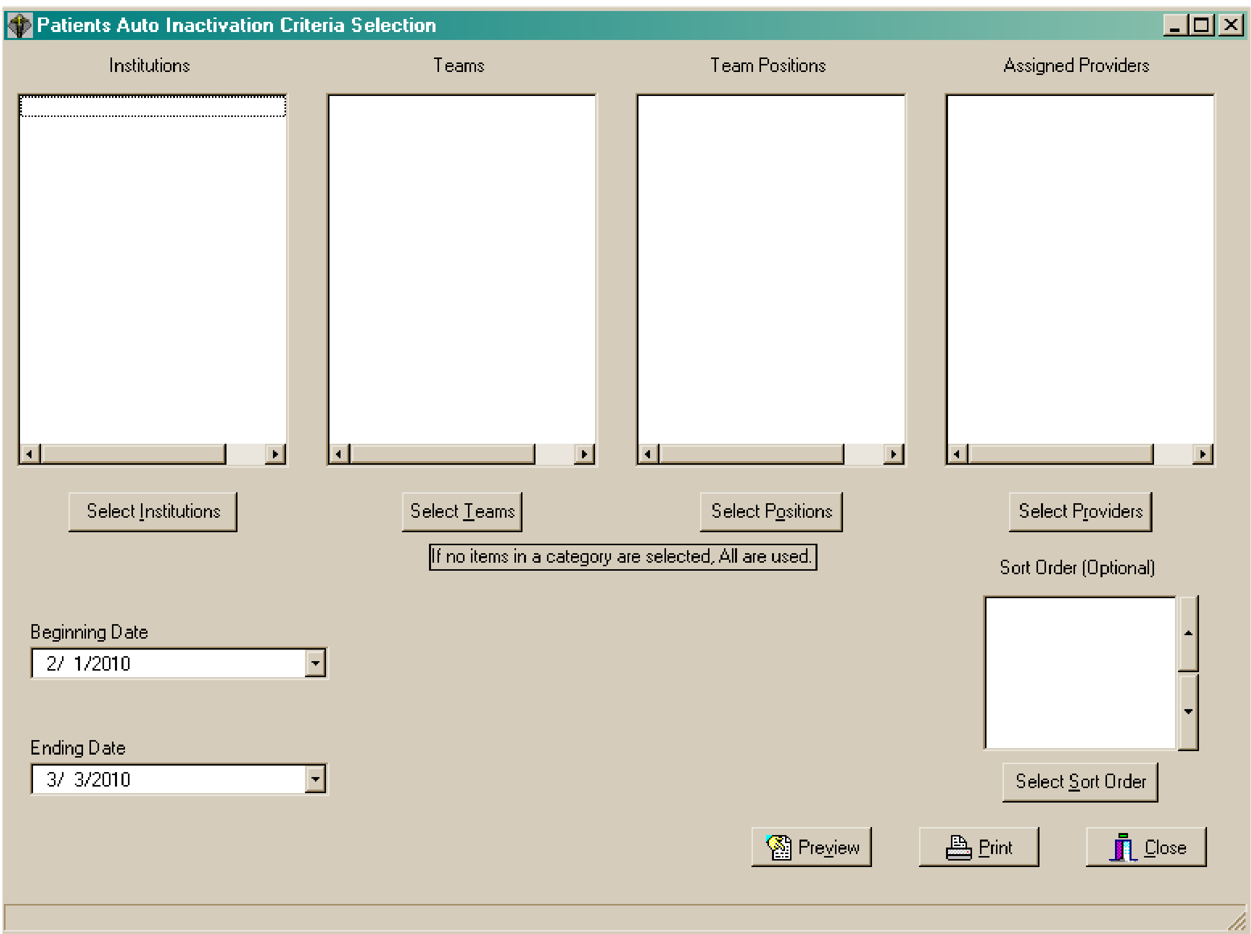
Delete
To delete an existing template, select the template name from the drop down list. Select the *Delete* menu bar command. Click OK.

Automated Patient Inactivation from Primary Care Panels Report - GUI

This report is used to build a report listing patients that were unassigned during a specific date range.

- Select REPORTS|PATIENTS AUTO INACTIVATION menu bar command. The Patients Auto Inactivation Criteria Selection form appears.

When selecting options keep in mind that the more categories you select, the longer the report will take. If no items in a category are selected, all are used. Please use care when making your selections to get the exact data you need.



Creating a Automated Patient Inactivation from Primary Care Panels Report

1. Click the Select Institutions button to select one or more institutions to include on the report. The Choices dialog will appear. Click on desired Institution(s) then click Include Selected to include the selected institution(s) or Include All to include all institutions.

2. Click the Select Teams button to select one or more teams to include on the report. The Choices dialog will appear. Click on desired team(s) then click Include Selected to include the selected team(s) or Include All to include all teams.

3. Click the Select Positions button to select one or more positions to include on the report. The Choices dialog will appear. Click on desired position(s) then click Include Selected to include the selected position(s) or Include All to include all positions.

4. Click the Select Providers button to select one or more providers to include on the report. The Choices dialog will appear. Click on desired provider(s) then click Include Selected to include the selected provider(s) or Include All to include all providers.

5. Click the Sort Order button to select which fields the report will be sorted by. The Choices dialog will appear. Click on desired field(s) then click Include Selected to include the selected field (s) or Include All to include all fields.

6. Click Beginning Date drop down list arrow to right of date to drop down a calendar and select a beginning date for the report. You may also type in the date by double-clicking to highlight the day/month/year then type your changes.

7. Click Ending Date drop down list arrow to right of date to drop down a calendar and select an ending date for the report. You may also type in the date by double-clicking to highlight the day/month/year then type your changes.

8. Click Preview to view the report before printing or Print to print the report to any Windows printer.

Report Descriptions - GUI

Below is a description of each available PCMM GUI report and any unique fields (shown in italics).

Detailed Patient Assignments – obsolete
Information can be found in the *Team Patient Listing* Report or *Practitioners Patients* Report

Individual Team Profile
Displays basic team definition information

Patient Listing for Team Assignments
Lists patients along with selected team information

Practitioner Demographics
Displays administrative information for a chosen practitioner - can only select one practitioner per report

Practitioner's Patients
Identifies the size and constituents of a practitioner's patient panel
Summary Only - Check to only print totals on the report

Summary Listing of Teams
Reports the number of patients assigned for each practitioner currently assigned to the team

Team Member Listing
Shows basic information on the team and member practitioners - may be used to review which practitioners were assigned to a team during a certain time period.
Date Range - Print the report for this date range. Double clicking on the date edit boxes generates a calendar to select from.

Team Patient Listing
Lists a team's patients and the clinics in which they are enrolled

Reports – Roll and Scroll

Many PCMM Reports are available only as roll and scroll Menu options.

From the Outputs menu (under the Scheduling Manager's menu), type **PCMM** to access the PCMM Main Menu. The PCMM Main Menu contains the following reports and options.

```
PT       PATIENT REPORTS AND OPTIONS…
PR       PROVIDER/POSITION REPORTS AND OPTIONS…
TM       TEAM REPORTS AND OPTIONS…
Har      HISTORICAL ASSIGNMENT REPORTS…
HL       PCMM HL7 AND MAINTENANCE MENU…
WL       WAIT LIST (SCH/PCMM) MENU…
```

Note: See Appendix for examples of many PCMM Reports.

Reports – Roll and Scroll

Patient Reports and Options

The Patient Reports and Options Menu accesses patient-related reports that are not available through the PCMM GUI.

Available Patient Reports are as follows.

```
AU       Team/Position Assignment/Re-Assignment
DPA      Detailed Patient Assignments
         **> Out of Order: Obsolete with SD*5.3*535
PAD      Historical Patient Assignment Detail
PATA     Patient Listing for Team Assignments
REV      Patient Team Position Assignment Review
PTAL     Historical Patient Position Assignment Listing
SCHD     Patients Scheduled for Inactivation from PC Panels
EXTD     Patients with Extended Primary Care Inactivation
INAC     Patients Automated Inactivations from PC Panels
EXTP     Extend Patient Inactivation Date
```

Reports – Roll and Scroll

Patient Reports and Options

Team/Position Assignment/Re-Assignment Option

This VistA option determines a patient's Primary Care status. This option is also available from the PCMM GUI (see note below). Based on status, it will prompt the user to select from the following choices.

- Assign patient to Primary Care (PC) or non-primary care team (if not currently assigned).
- Assign patient to PC or non-primary care Practitioner position (if assigned to a team, but not PC practitioner). User can perform a look-up by either position name or the current practitioner assigned to the position.
- Un-assign from team (if assigned to a PC or non-PC team). If patient is assigned to PC position, both the PC position and PC team will be unassigned.
- Un-assign from position.
- While assigning/un-assigning from a position: If the position has an Associated Clinic, the user will be prompted to enroll/discharge the patient from that Associated Clinic.

Note: This option must be used in the PCMM GUI if you need to:

- Edit or delete
- Re-assign patients with future PC assignments
- If the team position does not have a practitioner currently assigned to it

Reports – Roll and Scroll

Patient Reports and Options

Detailed Patient Assignments OUT OF ORDER - OBSOLETE

This report provides information regarding patient team and clinic assignments. This report requires 132-column output.

Report Columns
- Patient Name
- Patient ID
- Means Test Status
- Primary Eligibility
- Last Appointment
- Next Appointment
- Enrolled Clinic
- Primary Care Provider
- Associate Provider

Report Options
- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- (A)ssigned or (U)nassigned Patients to Primary Care Team - May select patients currently assigned or previously assigned to the chosen teams

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Assignment Detail

This 80-column report lists the providers and their positions and the teams to which the selected patient was assigned for the selected time frame.

Report Columns

- Patient
- SSN
- DOB
- Age
- Gender
- Assignment
  - PC Provider
  - PC Associate Provider
  - PC Position
  - User Entering
  - Last Edited By
  - Status
  - PC Preceptor Position
  - PC Team
  - Non-PC Provider
  - Non-PC Position
  - Non-PC Preceptor Provider
  - Non-PC Preceptor Position
  - Non-PC Team
- Active
- Inactive
- Assigned by/date

If user says YES to - Do you wish to view active patient record flag details?
Report Columns

- Patient Record Flags
- Date
- Page x of n
- Patient/SSN
- DOB
- ICN
- CMOR

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Assignment Detail, cont.

Report Options

- Select Patient Name
- If Active Patient Record Flag(s) are present this option appears:
  Do you wish to view active patient record flag details? Yes//
  If yes, then Patient Record Flags are listed.
- Select beginning date
- Select ending date
- Device

Reports – Roll and Scroll

Patient Reports and Options

Patient Listing for Team Assignments

This report provides information regarding patients' team assignment, sorted by Team and Practitioner. This report requires 132-column output.

Report Columns

- Patient Name
- Patient ID
- Date Assigned
- Primary Care Type (PC?)
  AP = Associate provider
  PCP = Primary Care Provider
  NPC = Non-Primary Care Provider
- Practitioner
- Position
- Standard Role
- Preceptor

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one or all roles
- Select Practitioner – May select one or more practitioners

Reports – Roll and Scroll

Patient Reports and Options

Patient Team Position Assignment Review

This report reviews Patient Team Position Assignments and identifies active positions with discharged team assignments. The report then generates a MailMan message that delivers the information to the requestor.

Report Columns

- Patient Team Position Assignments Reviewed
- Number of Assignments with Problems
- Team
- Position
- Patient
- Error

Report Options

- Select Team – May select one/many/all teams

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Position Assignment Listing

This report requires 132-column output.

Report Columns
Detailed Report contains

- Patient Name
- Patient ID
- Primary Eligibility
- Means Test Category
- Team
- Provider
- Team Position
- Primary Care Type (PC?)
  AP = Associate provider
  PCP = Primary Care Provider
  NPC = Non-Primary Care Provider
- Enrolled Clinic
- Activation Date
- Inactivation Date

Report Columns
Summary Report contains

- Category
- Count
- Percent
- Total assignments that meet the parameters of this report
- Total unique patients that meet the parameters of this report

Reports – Roll and Scroll

Patient Reports and Options

Historical Patient Position Assignment Listing, cont.

Report Options

- Select beginning date
- Select ending date
- Select one of the following
  - P Primary Care Assignments
  - N Non- Primary Care Assignments
  - B Both PC and Non-PC

  Specify the type of assignments to include:
- Select one of the following:
  - D Detail + Summary
  - S Summary Only

  Specify output format (Choose output format from the list above)
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select PC Provider - May select one/many/all PC providers
- Select Assigned Provider - May select one/many/all assigned providers
- Select Associated Clinic - May select one/many/all positions
- Select one of the following **** Output sort order (optional) ****
  - IN Institution
  - TM Team
  - TP Team Position
  - PR Provider
  - EC Enrolled Clinic
  - PT Patient

  Sort output by (Choose sort order from above list)

Reports – Roll and Scroll

Patient Reports and Options

Patients Scheduled for Inactivation from PC Panels

Header
Patients Scheduled for Inactivation from PC Panels (Title)   Date

Report Columns

- Patient Name
- SSN
- Institution
- PC Team
- Provider
- Team Position
- Date scheduled to Inactivate
- Next Appointment
- Date/Clinic

Report Options

- Select beginning date
- Select ending date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select PC Provider - May select one/many/all PC providers
- Select one of the following   **** Output sort order (optional) ****

    IN   Institution
    TM   Team
    TP   Team Position

Patients Scheduled for Inactivation from PC Panels

    PR   Provider
    PT   Patient

Sort output by   (Displays the sort order selected)

Reports – Roll and Scroll

Patient Reports and Options

Patients with Extended Primary Care Inactivation

Report Columns

- Patient
- SSN
- Institution
- PC Team
- Provider/Position
- Preceptor/Position
- Date Scheduled for Inactivation/Reason

Report Options

- Select beginning date
- Select ending date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select Assigned Provider - May select one/many/all assigned providers
- Select one of the following **** Output sort order (optional) ****

  IN Institution
  TM Team
  TP Team Position

  PCMM Patients with Extended Inactivations

  PR Provider
  P Patient

  Sort output by: (Displays the sort order selected)

Reports – Roll and Scroll

Patient Reports and Options

Patients Automated Inactivations from PC Panels

Report Columns
- Patient
- SSN
- Institution
- PC Team
- Provider/Team Position
- Preceptor/Team Position
- Date Patient Inactivated
- Reason Patient Inactivated

Report Options
- Select beginning date
- Select ending date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select Assigned Provider - May select one/many/all assigned providers
- Select one of the following: **** Output sort order (optional) ****
  IN Institution
  TM Team
  TP Team Position

  PCMM Patients with Extended Inactivations

  PR Provider
  PT Patient

Reports – Roll and Scroll

Patient Reports and Options

Extend Patient Inactivation Date

This option lists the patients, by name only, that are scheduled for automatic inactivation for the selected team. It allows for extending the date of the automatic inactivation and selecting a reason for the extension.

Report Columns

- None

Report Options

- Select Team Name
- Select From - Select from the list of patients on the team that are schedule for inactivation
- Extend Automatic Inactivation (Possible choices)

0 - Do Not Extend (Default)
1 - Patient has Future PC Appointment
2 - Provider Request – Will Contact Patient
3 - Patient Contacted Site for Appointment
4 - Other [Place comment here]

Reports – Roll and Scroll

Provider/Position Reports and Options

PCMM Roll and scroll – Provider/Position Reports and Options Menu

```
EP     PCMM Edit Practitioner in Position Assig. File
PD     Practitioner Demographics
PP     Practitioner's Patients
PRAL   Historical Provider Position Assignment Listing
INCR   PCMM Inconsistency Report
FTEE   FTEE and Panel Size Report
SSI    Staff Sched for Inactivation
SI     Staff Inactivated Report
```

Reports – Roll and Scroll

Provider/Position Reports and Options

PCMM Edit Practitioner in Position Assig. File

This report identifies invalid practitioner entries and allows for edits. It is locked with the SC PCMM SETUP security key.

Reports – Roll and Scroll

Provider/Position Reports and Options

Practitioner Demographics

This report provider information about the practitioners.

Report Columns

- Name
- Date
- Service/Section
- Team
- Position
- Role
- User Class
- Room
- Phone
- Associated Clinic
- Person Class
- Patients Allowed
- Patients Assigned

Report Options

- Select individual Practitioner - Answer with NEW PERSON NUMBER, or NAME, or INITIAL, or SSN, or VERIFY CODE, or NICK NAME, or MAIL CODE, or DEA#, or VA#, or ALIAS
- Note: Imprecise selections will yield an additional prompt.

Reports – Roll and Scroll

Provider/Position Reports and Options

Practitioner's Patients

Report Columns (Summary Report)
- Date
- Patients
- Practitioner Position
- Team
- Patients Assigned (Number of Patients Assigned)

Report Columns (Detailed Report)
- Date
- Team
- Division
- Practitioner
- Patient Name
- Patient ID
- Means Test Status
- Primary Eligibility
- Last Appointment
- Next Appointment
- Clinic

Report Options
- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one/many/all roles
- Select Practitioner - May select one/many/all practitioners
- Print Summary Only? N// y YES
- Sort By:
  [1] Division, Team, Practitioner
  [2] Division, Practitioner, Team
  [3] Practitioner, Associated Clinic

Reports – Roll and Scroll

Provider/Position Reports and Options

Historical Provider Position Assignment Listing

This report reflects a count of all unique patients assigned to primary care and non-primary care within the date range selected. If a date range larger than one day has been selected, the total patients assigned to a provider may be greater than the maximum defined for the position. However, this does not imply that the provider had more than their maximum number of patients on any single date.

Report Columns

- Detail for Provider Position Assignments Effective (Date Range)
- Date printed (Date and Time)
- Provider Name
- Position
- Primary Care Status (PC?)
- Team
- Associated Clinic
- Max. Patients Allowed
- Assigned Patients Primary Care (PC)
- Assigned Patients Non-Primary Care (Non-PC)
- Open Slots
- Precepted Patients Primary Care (PC)
- Precepted Patients Non-Primary Care (Non-PC)

Reports – Roll and Scroll

Provider/Position Reports and Options

Historical Provider Position Assignment Listing, cont.

Report Options

- Select beginning date: TODAY// (APR 03, 2006) Date Range Selection
- Select ending date: TODAY// (APR 03, 2006) Date Range Selection
- Select one of the following: Report Parameter Selection
  P PRIMARY CARE ASSIGNMENTS
  N NON-PRIMARY CARE ASSIGNMENTS
  B BOTH PC AND NON-PC
- Specify the type of assignments to include: BOTH// b BOTH PC AND NON-PC
- Select one of the following:
  D DETAIL + SUMMARY
  S SUMMARY ONLY

Specify output format: DETAIL + SUMMARY// d DETAIL + SUMMARY
Select Institution - May select one/many/all divisions
Select Team - May select one/many/all teams
Select Assigned Provider - May select one/many/all providers
Select Associated Clinic - May select one/many/all clinics
Select one of the following Output sort order (optional)
IN INSTITUTION
TM TEAM
TP TEAM POSITION
PR PROVIDER
EC ENROLLED CLINIC

Sort output by (Lists selected output)

Reports – Roll and Scroll

Provider/Position Reports and Options

PCMM Inconsistency Report

Report Columns

- Position Inconsistencies
- Inconsistency (i.e., Position has no staff assigned)
- Team
- Position
- Patient Inconsistencies
- Patient
- SSN
- Inconsistency (i.e., Position assignment with inactive Team Assignment)
- Team
- Position

Report Options

- Select one of the following:
  A All Teams
  S Specific Teams
  I Inconsistency Descriptions

- Select one of the following: (Report Type)
  B Brief
  DP Detailed by PATIENT
  DT Detailed by TEAM

Reports – Roll and Scroll

Provider/Position Reports and Options

FTEE and Panel Size Report

Report Columns
- Date
- Provider's Name
- Team
- Team Position
- AP or PCP
- Associated Clinic
- FTEE
- Patient's for Position Actual/Active
- Patient's for Position Allowed/Maximum
- Available Patient Openings
- Adjusted Panel Size
- Total

Report Options
- Select Institution - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select Assigned Provider - May select one/many/all providers
- Select one of the following: Output sort order (optional)
  IN INSTITUTION
  TM TEAM
  TP TEAM POSITION
  PR PROVIDER
  AC ASSOCIATED CLINIC
- Sort output by (Lists selected output)

Reports – Roll and Scroll

Provider/Position Reports and Options

Staff Sched for Inactivation

Note: Do not print this report between 7 am and 5 pm. Because this report is resource intensive, printing should be done during off peak hours.

Report Columns

- Date
- Name
- Team Position
- Associated Clinics
- Role
- Person Class
- Number of Patients (# of pts)
- Scheduled Inactivation Date
- Inconsistency Reason

Report Options

- Start with Institution
- Go to Institution
- Device

Reports – Roll and Scroll

Provider/Position Reports and Options

Staff Inactivated Report

Report Columns
- Date
- Name
- Team Position
- Associated Clinics
- Role
- Person Class
- Number of Patients (# of pts)
- Date Inactivation
- Inconsistency Reason

Report Options
- Start with Institution
- Go to Institution
- Device

Reports – Roll and Scroll

Team Reports and Options

Example of Team Reports and Options Menu

```
ITP    Individual Team Profile
TML    Team Member Listing
TPL    Team Patient Listing
SLT    Summary Listing of Teams
TAS    Historical Team Assignment Summary
```

Reports – Roll and Scroll

Team Reports and Options

Individual Team Profile

This report requires 132-column output. This report provides information team members and their assignments.

Report Columns

- Printed on (Date)
- Division
- Team Name
- Service/Section
- Team Phone
- Team Settings
- Status (Active /Inactive)
- Maximum Patients
- Unique Patients Assigned
- Purpose
- Note: (This team is not accepting patients/This team is still accepting patients!)
- Team Description
- Team Position
- Provider Name
- Standard Role
- Primary Care Status (PC?)
- Patients Allowed
- Patients Assigned
- Associated Clinic

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams

Reports – Roll and Scroll

Team Reports and Options

Team Member Listing

This 80 column report list team members during a specific date range. Using the default date of **Today** will list only current team members.

Report Columns

- Printed on
- Division
- Team Name
- Team Phone
- Primary Care Team (Yes/No)
- Members (Name)
- Position
- Standard Role
- User Class
- Associated Clinic
- Office Phone
- Room
- Begin Date
- End Date
- Person Class

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Begin Date
- End Date
- Select Role - May select one/many/all roles

Reports – Roll and Scroll

Team Reports and Options

Team Patient Listing

Report Columns

- Printed on
- Division
- Team
- Team Phone
- Primary Care Team (Yes/No)
- Team Description
- Patient Name
- Patient ID
- Practitioner
  [Not Assigned] = Patient assigned to Team but not to a position/provider
  [Inactive Position] = Patient assigned to Team & Position but has no active provider
- Role
- Primary Care Type (PC?)
- Last Appointment
- Next Appointment
- Associated Clinic

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one/many/all roles
- Sort by

[1] Division, Team, Patient Name

[2] Division, Team, Last 4 Pt ID

[3] Division, Team, Practitioner, Patient Name

[4] Division, Team, Practitioner, Last 4 Pt ID

Select 1, 2, 3, or 4:

Reports – Roll and Scroll

Team Reports and Options

Summary Listing of Teams

Report Columns

- Printed on
- Division
- Team Name
- Practitioner
- Position
- Primary Care Type (PC?)
- Standard Role
- Associated Clinic
- Maximum Patients Allowed
- Assigned Patients - Primary Care
- Assigned Patients - Non Primary Care
- Precepted Patients - Primary Care
- Precepted Patients - Non Primary Care

Report Options

- Select Division - May select one/many/all divisions
- Select Team - May select one/many/all teams
- Select Role - May select one/many/all roles

Reports – Roll and Scroll

Team Reports and Options

Historical Team Assignment Summary

This 132-column report represents a count of team and team position assignments within the date range selected. If a date range larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined for the team, reducing the open slots reflected by this report accordingly. However, this does not imply that the team had more than its maximum number of patients on any single date.

Report Columns

- Effective Date Range
- Printed on
- Division
- Team
- Primary Care Type (PC?)
- Maximum Patients
- Team Assignment
- Team Assignment Unique
- Team Position Assignments Primary Care
- Team Position Assignments Non Primary Care
- Team Position Unique Patients Primary Care
- Team Position Unique Patients Non Primary Care
- Total Unique Patients
- Open Slots
- Patients without Position Assignment
- Patients without Team Assignment

Report Options

- Begin Date
- End Date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams

Reports – Roll and Scroll

Historical Assignment Reports

Example of PCMM Roll and scroll – Historical Assignment Reports Menu

```
PAD     Historical Patient Assignment Detail
PRAL    Historical Provider Position Assignment Listing
PTAL    Historical Patient Position Assignment Listing
TAS     Historical Team Assignment Summary
```

Reports – Roll and Scroll

Historical Assignment Reports

Historical Patient Assignment Detail

Report Columns

- Date printed
- Patient
- SSN
- DOB
- Age
- Gender
- Assignment
  - PC Provider
  - PC Associate Provider
  - PC Position
  - User Entering
  - Last Edited By
  - Status
  - PC Preceptor Position
  - PC Team
  - Non-PC Provider
  - Non-PC Position
  - Non-PC Preceptor Provider
  - Non-PC Preceptor Position
  - Non-PC Team
- Active
- Inactive
- Assigned by/date

Report Options

- Select Patient Name
- Select beginning date
- Select ending date
- Device

Reports – Roll and Scroll

Historical Assignment Reports

Historical Provider Position Assignment Listing

Report Columns

- Effective Date Range
- Printed on
- Division
- Team
- Primary Care Type (PC?)
- Maximum Patients
- Team Assignment
- Team Assignment Unique
- Team Position Assignments Primary Care
- Team Position Assignments Non Primary Care
- Team Position Unique Patients Primary Care
- Team Position Unique Patients Non Primary Care
- Total Unique Patients
- Open Slots
- Patients without Position Assignment
- Patients without Team Assignment

Report Options

- Select beginning date
- Select ending date
- Select one of the following (Specify the type of assignments to include
  P PRIMARY CARE ASSIGNMENTS
  N NON-PRIMARY CARE ASSIGNMENTS
  B BOTH PC AND NON-PC
- Select one of the following (Specify output format)
  D DETAIL + SUMMARY
  SUMMARY ONLY
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select one of the following (Sort output by)
  IN INSTITUTION
  TM TEAM
  TP TEAM POSITION
  PR PROVIDER
  EC ENROLLED CLINIC

:

Reports – Roll and Scroll

Historical Assignment Reports

Historical Patient Position Assignment Listing

In this 132-column report, more than one provider may be associated with a single patient position assignment. This output returns a separate output line for each related provider during the date range selected.

Report Columns

- Date printed
- Patient Name
- Patient ID
- Primary Eligibility
- Means Test Category
- Team
- Provider
- Team Position
- Primary Care Type (PC?)
  AP = Associate provider
  PCP = Primary Care Provider
  NPC = Non-Primary Care Provider
- Enrolled Clinic
- Activation Date
- Inactivation Date

Report Options

- Select beginning date
- Select ending date
- Select one of the following (Specify the type of assignments to include)
  P PRIMARY CARE ASSIGNMENTS
  N NON-PRIMARY CARE ASSIGNMENTS
  B BOTH PC AND NON-PC
- Select one of the following (Specify output format)
  D DETAIL + SUMMARY **or** S SUMMARY ONLY
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams
- Select Team Position - May select one/many/all positions
- Select one of the following (Sort output by)
  IN INSTITUTION
  TM TEAM
  TP TEAM POSITION
  PR PROVIDER
  EC ENROLLED CLINIC
  PT PATIENT

Reports – Roll and Scroll

Historical Assignment Reports

Historical Team Assignment Summary

This 132-column report represents a count of team and team position assignments within the date range selected. If a date range larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined for the team, reducing the open slots reflected by this report accordingly. However, this does not imply that the team had more than its maximum number of patients on any single date.

Report Columns

- Effective Date Range
- Printed on
- Division
- Team
- Primary Care Type (PC?)
- Maximum Patients
- Team Assignment
- Team Assignment Unique
- Team Position Assignments Primary Care
- Team Position Assignments Non Primary Care
- Team Position Unique Patients Primary Care
- Team Position Unique Patients Non Primary Care
- Total Unique Patients
- Open Slots
- Patients without Position Assignment
- Patients without Team Assignment

Report Options

- Begin Date
- End Date
- Select Institution - May select one/many/all institutions
- Select Team - May select one/many/all teams

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

Example of PCMM Roll and scroll – PCMM HL7 and Maintenance Menu

```
NT      PCMM NIGHTLY TASK
AAC     Retransmit one Patient or Provider
ECR     PCMM Transmission Error Code Report
EP      PCMM Transmission Error Processing
ER      PCMM Transmission Error Report
CG      Clean-Up Ghost Entries
CI      Clean-Up Incorrect Team Institution Pointers
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Nightly Task

This task should be scheduled once a day. It reviews patient team assignments and inactivates patients who have assignment dates greater than two years old and have not been seen in the last year. This task also identifies staff members who are improperly assigned as Primary Care Providers (PCP). The task also reviews data for other inactivation scenarios. See Inactivation Messages section for examples of the types of bulletins that are sent.

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

Retransmit one Patient or Provider

To retransmit a single patient enter the patient name at the prompt:
Select PATIENT NAME

To retransmit all patients for a given provider, press return to select the provider.
Select Provider

Either the Patient name or the Provider name must be entered.

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Code Report

Introduction

The PCMM Transmission Error Code Report option is used to print a list of error codes, their descriptions, and the associated field (if applicable) for all possible transmission reject errors received back from the AITC. The only prompt is for device selection.

This 80 column report lists and defines error codes.

Report Columns

- Date
- Error
- Code Field
- Description

Report Options

- Device

Example

```
PCMM Transmission Error Code Report           MAY  2,2006  14:26    PAGE 1
ERROR CODE FIELD                        DESCRIPTION
--------------------------------------------------------------------------

100         3
150         6
200         39
250         4
300         39
350         11
400         7
450         11
500         11
550         8                        Auto rebook date requires SCH.8
                                     Appt Type="ABK" and vice versa.
600         8                        Rescheduled date requires SCH.8
                                     Appt Type= 'RS' and vice versa.
650         7                        Check out date requires either
                                     SCH.6 Event Reason='CO' or 'COE'.
700         7                        Cancellation Date requires SCH.6
                                     Event Reason='CC' or 'CP' or
                                        'NS'.
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Code Report, cont.

```
PCMM Transmission Error Code Report           MAY  2,2006  14:26    PAGE 2
ERROR CODE  FIELD                              DESCRIPTION
--------------------------------------------------------------------------

750         25                                All SCH.6 Event Reason codes,
                                              except 'CI' require SCH.25
Filler
                                              status to be 'F' - Final and
                                              accordingly only 'CI' and NULL
                                              should have SCH.25 Filler Status
                                              to be 'P' - Pending.
800         25
000M                                          No errors.
001M                                          EVN segment missing (Contact IRM
                                              for assistance).
002M                                          PID segment missing (Contact IRM
                                              for assistance).
003M                                          ZPC segment missing (Contact IRM
                                              for assistance).
005M                                         Invalid segment name (Contact IRM
                                              for assistance).
006M                                          ORG segment missing
007M                                          STF Segment Missing
008M                                          ZPT Segment Missing
104M        Event Date/Time                   Event Date is missing or out of
                                              range.
106M        Event Date/Time                  Event Time is invalid or missing.
110M        Message Control ID                Message Control ID missing
                                              (Contact IRM for assistance).
113M        Event Type                        Event Type is not 'A08' (Contact
                                              IRM for assistance).
114M        2                                 EVN must be B02
200M        Patient Name                      Patient Name is missing or
                                              invalid..
210M        Patient ID                        Patient ID is missing or not
                                              numeric.
220M        Date of Birth                     Date of Birth is missing.
221M        Date of Birth                    Invalid year or year greater than
                                              the processing year.
223M        Date of Birth                     Invalid Date of Birth.
224M        Date of Birth                     Date of Birth greater than
                                              processing date.
230M        Sex                               Sex code is invalid or missing.
240M        Race                              Invalid Race code.
250M        Marital Status                    Invalid Marital Status code.
260M        State                             Invalid state code.
261M        County                            Invalid County code.
262M        Address Line 1                    Address Line 1 is all numeric.
263M        Address Line 2                    Address Line 2 is all numeric.
264M        City                              City contains all numbers.
270M        Religion                          Invalid Religion code.
280M        Zip Code                          Zip Code not numeric.
290M        SSN                               SSN is missing, or not numeric,
                                              or is equal to zeros.
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Code Report, cont.

```
PCMM Transmission Error Code Report           MAY  2,2006  14:26    PAGE 3
ERROR CODE  FIELD                              DESCRIPTION
--------------------------------------------------------------------------
291M        SSN                                Pseudo SSN is not 'P' or blank.
300M        Provider Assignment ID             Provider Assignment ID is
                                               invalid.
310M        Provider ID                        Non-numeric ID and/or invalid
                                               entry.
320M        Date Provider Assigned             Date Provider Assigned is an
                                               invalid date.
330M        Date Provider Unassigned           Date Provider Unassigned is an
                                               invalid date (if date is
                                               present).
340M        Provider Type Code                 Provider Type Code is not 'PCP'
                                               or 'AP'.
350M        Provider Person Class             Provider Person Class (seq 6 comp
                                              1) is invalid.
360M        Provider Person Class             Provider Person Class (seq 6 comp
                                              3) not 'VA8932.1'.
370M        Provider SSN                       Provider SSN not numeric or all
                                               zeros.
390M        Provider Facility/Suffix.          Required, Must be a valid
                                               facility number/suffix.
502M        2                                  Invalid Staff Code
602M        2                                  Invalid Organization Unit Code
608M        8                                  Invalid Area of Specialization
702M        2                                  DIRECT PATIENT CARE FTEE INVALID
703M        3                                  MAXIMUM WORKLOAD INVALID
801M        1                                  Missing Field Separator
802M        2                                  Missing encoding character
809M        9                                  Missing Message Type
810M        10                                 Missing Message control ID
811M        11                                 Missing processing ID
812M        12                                 Missing version ID
R           11
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Processing

Introduction

An acknowledgement transaction message will be returned from the Austin Information Technology Center (AITC) for each PCMM HL7 transaction message that is originated from VistA. When the AITC is unable to process a PCMM transmission, they will respond with an acknowledgement message containing errors. The PCMM Transmission Error Processing option will allow you to work with lists of patients for which error messages were received.

You will not have the ability to correct errors through this option. Errors must be corrected using the appropriate VistA and PCMM GUI options. Once an error has been corrected, the patient must be marked for retransmission through this option. The actual retransmission will then occur through the normal operation of the PCMM HL7 Transmission option.

You must hold the SCMC PCMM RETRANSMIT security key to use any of the “retransmit” error processing selections. If you do not hold the key, these actions will appear in brackets (as shown below) and you will not be able to select them.

```
MC  Mark Error as Checked/Corrected     MN  Mark Error as New/Uncheck
SP  Select Record(s) for Retransmit     DP  Deselect Record(s) for Retransmit
SA  Select All for Retransmit           DA  Deselect All for Retransmit
CE  Change Error Processing Status      CD  Change Date Range
CS  Change Sort By Criteria             PL  Print List
```

The following is a general outline of the procedures used to obtain lists of patients with transmission acknowledgement errors, correct the data that is indicated in the errors, and mark the patients for retransmission to the AITC.

1. Generate a list of patients with transmission acknowledgement errors using the PCMM Transmission Error Processing option.

2. Users may select one of the following PCMM Transmission Error Processing actions to configure the error list based on user preference.

   (CE) Change Error Processing Status
   (CS) Change Sort by Criteria
   (CD) Change Date Range

3. When transmission acknowledgement errors are received, they are initially marked as NEW. Users should correct each error that is marked as NEW using the appropriate PCMM GUI and/or VistA options.

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Processing, cont.

3.1 Evaluation and correction of 608M rejection

If the 608M record has a provider indicated, and that provider is still active, the provider's correct person class should be determined and corrected in the NEW PERSON file (# 200) using FileMan. (Proceed to Step 4 below).

If the 608M record has a provider indicated and that provider is now inactive, try to retransmit again (this transmission should now be accepted if the person class was correct). If the record is rejected repeatedly, and if the provider is now inactive and the system is preventing corrections to the historical person class assignment, you may wish to remove it from the PCMM Transmission error report(s), especially if it is associated with an older/obsolete event. If this is necessary, ask your IRM staff to edit and thereby deactivate the 608M error through FileMan: To find the related record in the PCMM HL7 Transmission Log file (#404.471), they can use the FileMan Print or Search option to find records with at least one 608M error in the ERROR CODE multiple, and any other criteria that will narrow the search, then review the list and find the desired entry. Through the FileMan edit option, change the STATUS field (#4) to RT: RE-TRANSMITTED and the ERROR PROCESSING STATUS field (#.06) of the ERROR CODE Multiple (#404.47142) to CHECKED.

Eliminating a 608M rejection using FileMan

INPUT TO WHAT FILE: **PCMM HL7 TRANSMISSION LOG**//
EDIT WHICH FIELD: **ALL**//
Select PCMM HL7 TRANSMISSION LOG MESSAGE CONTROL ID: 55224679952
MESSAGE CONTROL ID: 55224679952//
PATIENT: PCMMPATIENT, ONE//
TRANSMISSION DATE/TIME: JAN 14,2003@21:00:04//
STATUS: REJECTED// **RT** RE-TRANSMITTED
ACK RECEIVED DATE/TIME: JAN 16,2003@00:58:56//
INCLUDED IN REJECT BULLETIN?: YES//
WORKLOAD EVENT POINTER:
PRACTITIONER:
Select SEQUENCE:
Select ERROR CODE: 608M//
  ERROR CODE: 608M//
  SEGMENT: ORG//
  SEQUENCE: 8//
  FIELD POSITION: 1//
  ZPC ID:
  ERROR PROCESSING STATUS: NEW// **CHECKED** CHECKED
  Select ERROR CODE:

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Processing, cont.

4. Once an error has been corrected, mark the errors as Checked/Corrected using the (MC) Mark Error as Checked/Corrected action. Since it is possible to have multiple errors for a single patient, this action allows a user to keep track of each error corrected prior to marking the patient for retransmission to the AITC.

5. Upon correcting all errors for a patient, the user should use the (SP) Select Patient(s) for Retransmit action to mark the patient for retransmission to the AITC. NOTE: A patient should only be marked for retransmission once all the errors for the patient have been corrected. If all errors have been corrected for all patients, the (SA) Select All for Retransmit action may be used to select all patients for retransmission.

6. The actual retransmission of the patient will occur through the normal operation of the PCMM HL7 Transmission option that is scheduled to run daily. Once a patient has been retransmitted, they will automatically be removed from the list.

PCMM Transmission Error Processing Actions

MC Mark Error as Checked /Corrected
Changes the error processing status from *new* to *checked*. It is recommended this action be used to change the processing status once the error has been corrected.

SP Select Patient(s) for Retransmit
Allows selected patients to be marked for retransmission. The error processing status for the selected patients will automatically be marked as *checked*. Since ***all*** errors for the selected patient will be marked as *checked*, care should be taken when a single patient name has multiple errors that all the errors have actually been corrected before being marked for retransmission.

SA Select All for Retransmit
Allows all patients on the error list to be marked for retransmission. The error processing status for all patients will automatically be marked as *checked*.

CE Change Error Processing Status
Allows the user to change the error processing status of the error list being viewed. Statuses include *new*, *checked*, or *both*.

CS Change Sort By Criteria
Allows the user to change the sort criteria of the error list being viewed. Choices include patient name, institution, date received and provider.

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Processing, cont.

MN Mark Error as New/Uncheck
Changes the error processing status from previously marked as *checked* to *new*.

DP Deselect Patient(s) for Retransmit
Allows the user to deselect individual patients previously marked for retransmission.

DA Deselect All for Retransmit
Allows the user to deselect all patients previously marked for retransmission.

CD Change Date Range
Allows the user to change the date range of the error list being viewed. Initially all errors will be displayed. If this action is selected, the default value at the prompt will be two weeks prior to the current date.

PL Print List
Allows the user to print the entire list of entries currently being displayed

Example

```
CS  Change Sort By Criteria             PL  Print List

PCMM Transmission Errors      May 02, 2006@14:33:02          Page:    1 of    1
Sort By: Patient Name                            Date Range: (None) List All Errors
Error Processing Status: New/Checked         * - Marked for re-transmit

       Patient Name         PATID  Date Rec'd  Provider           Type  EP Stat
1      Workload                    01/13/06                       PC    Checked
         Error: 608M - Invalid Area of Specialization
2      Workload                    01/13/06                       PC    Checked
         Error: 608M - Invalid Area of Specialization
3      Workload                    01/13/06                       PC    Checked
         Error: 608M - Invalid Area of Specialization
4      Workload                    01/13/06                       PC    Checked
         Error: 608M - Invalid Area of Specialization
5      Workload                    01/13/06                       PC    Checked
         Error: 608M - Invalid Area of Specialization
6      Workload                    01/13/06                       PC    Checked
         Error: 608M - Invalid Area of Specialization
          Enter ?? for more actions                                          >>>
MC  Mark Error as Checked/Corrected     MN  Mark Error as New/Uncheck
SP  Select Record(s) for Retransmit     DP  Deselect Record(s) for Retransmit
SA  Select All for Retransmit           DA  Deselect All for Retransmit
CE  Change Error Processing Status      CD  Change Date Range
CS  Change Sort By Criteria             PL  Print List
Select Action:Quit//
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Report

Introduction

The PCMM Transmission Error Report option is used to print a list of patients for which transmission error messages were received from the Austin Information Technology Center (AITC).

Both the PCMM Transmission Error Processing option and the PCMM Transmission Error Report option will provide a list of patients for which error messages were received. If a very large number of errors are returned from the AITC, then the PCMM Transmission Error Report option is the best choice to view this list as the report may be queued. Otherwise, it is recommended that the PCMM Transmission Error Processing option be utilized to work with lists of patients for which error messages were received.

The report may be printed for all errors or for a date range. Either print action can be sorted by the following fields.

patient name	alphabetically by patient name
date error received	chronological order by date error received
provider	alphabetically by provider name

You may also choose which error processing status to include on the report, *new*, *checked*, or *both* statuses. Errors are initially marked as *new* and should be changed to *checked* once the error has been corrected.

Information provided on the report may include patient name, patient ID, date error received, provider name, provider type, and error processing status.

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

PCMM Transmission Error Report, cont.

Example

```
   Select one of the following:

     A     All Errors
     D     Date Range

Select all errors or a date range: a  All Errors

   Select one of the following:

     N     Patient Name
     D     Date Error Received
     P     Provider

Select sort criteria for listing PCMM Transmission Errors: n  Patient Name

   Select one of the following:

     1     New
     2     Checked
     3     Both

Select Error Processing Status: 3  Both
DEVICE: HOME// <RET>  UCX/TELNET  Right Margin: 80// <RET>



PCMM Transmission Error Report   Run Date: May 02, 2006 2:37:05 pm    Page 1

Sort By: Date Error Received            Date Range: (None) List All Errors
Error Processing Status: New/Checked    * - Marked for re-transmit

  Patient Name         PATID   Date Rec   Provider             Type   EP Status
--------------------------------------------------------------------------------

  Workload                     01/13/06   N/A                  N/A    Checked
     Error: 608M-Invalid Area of Specialization
  Workload                     01/13/06   N/A                  N/A    Checked
     Error: 608M-Invalid Area of Specialization
  Workload                     01/13/06   N/A                  N/A    Checked
     Error: 608M-Invalid Area of Specialization
  Workload                     01/13/06   N/A                  N/A    Checked
     Error: 608M-Invalid Area of Specialization
  Workload                     01/13/06   N/A                  N/A    Checked
     Error: 608M-Invalid Area of Specialization
  Workload                     01/13/06   N/A                  N/A    Checked
     Error: 608M-Invalid Area of Specialization
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

Clean-Up Ghost Entries

Introduction

This utility has been created to clean up dangling pointers in the PATIENT TEAM POSITION ASSIGNMENT file (#404.43). This utility loops through the PATIENT TEAM POSITION ASSIGNMENT (#404.43) file and finds the pointers to the PATIENT TEAM ASSIGNMENT (#404.42) file. It will then prompt the user as to whether or not they want the utility to clean up the identified "Ghost Entries."

Example

```
SCMC CLEAN GHOST ENTRIES     Clean-Up Ghost Entries

Clean-Up Ghost Entries

Checking for "Ghost Entries" in the PATIENT TEAM POSITION ASSIGNMENT FILE.
This may take a moment.  You will be provided with a list showing corrupted
file entries.  To perform a clean-up accept the "Yes" prompt after the list
is displayed. Answer "No" to abort the clean-up.

DEVICE:   UCX/TELNET    Right Margin: 80//
PATIENT TEAM POSITION ASSIGNMENT LIST          AUG 10,2007  11:08    PAGE 1
--------------------------------------------------------------------------------




          *** NO RECORDS TO PRINT ***
3159 entries searched.  Ghost entries found:  0
Nothing to clean up....
```

Reports – Roll and Scroll

PCMM HL7 and Maintenance Menu

Clean-Up Incorrect Team Institution Pointers

Introduction

This utility has been created to check each team's institution in order to make sure it contains at least the station's base numeric identifier. The utility will then provide a list of teams whose station number association does not match the numeric identifier listed.

Example

```
Select PCMM HL7 AND MAINTENANCE MENU Option: CI   Clean-Up Incorrect Team Institution
Pointers

Your Station Name:  CHEYENNE VAMC
          Number:  442
This option will output a list of TEAMS whose Station Number association
does not match the number listed above.

DEVICE:   TELNET TERMINAL

TEAM LIST                                      AUG 10,2007  11:01    PAGE 1
NAME                            INSTITUTION                         STATION #
--------------------------------------------------------------------------------

GREEN TEAM                      ALBANY, NY (NHCU)                   5009AA
JOHN 498 TEST                   PROVIDENCE VAMC                     650


The listed entries from the TEAM file need to be reviewed for Institution.
PCMM GUI clients prior to SD*5.3*297 allowed Team association to any entry
in the Institution File.
```

If all teams have the correct institution, the following output will be generated:

```
TEAM LIST                                      AUG 10,2007  11:07    PAGE 1
NAME                            INSTITUTION                         STATION #
--------------------------------------------------------------------------------

          *** NO RECORDS TO PRINT ***

No problems found.
```

Reports – Roll and Scroll

Wait List (Sch/PCMM) Menu

Example of Wait List (Sch/PCMM) Menu

```
   1      Inquire Wait List (Sch/PCMM)
   2      Enter/Edit Wait List (Sch/PCMM)
   3      Disposition Wait List (Sch/PCMM) Entry
   4      Wait List (Sch/PCMM) Reports ...
   5      Wait List (Sch/PCMM) Parameter Enter/Edit
```

Stand-alone Options

This section includes the option documentation for the Mass Team/Position Unassignment option and the Patient Team Position Assignment Review option. These options are not distributed as part of any existing menu. They are intended for IRM or select ADPAC personnel.

Mass Team/Position Unassignment

Introduction

The Mass Team/Position Unassignment option can be used to unassign a large number of patients from an active team or an active position using the List Manager functionality. It is recommended that distribution of this option be limited.

The effective date you choose for the unassignment may be in the past, today, or in the future. The list of patients displayed contains all patients with assignments to the selected team/position, as of the selected effective date or after the effective date. Those with assignment dates in the future will show an asterisk (*) next to the assigned date.

When patients are unassigned from the team, they are also automatically unassigned from any associated position. If a position is associated with a clinic, you are given the opportunity to also discharge patients from the clinic.

The following is an explanation of the actions available.

SA Select all patients on the list
DA Deselect all patients on the list
SP Select individual patients
DP Deselect individual patients
VA List all patients. Those selected will show a YES in the Selected column.
VS Only list patient that have been selected
VD Only list patients that have not been selected
UN Will queue the unassignment process after you say you want to continue

Mass Team/Position Unassignment

After you have selected the patients, choose the Unassign Patients action. A summary of the unassignments that will occur is displayed. You are then asked if you are sure you want to continue. A YES response immediately queues the unassignment process and the Task # is displayed. A NO response returns the screen to where it was before the Unassign Patients action was entered.

A confirmation MailMan message is generated from the utilization of the unassign action. It contains the team name and the effective date of the unassignment. The “Entry#” (shown for errors and for future assignments that are deleted) is the internal entry number of the deleted entry. It comes from the PATIENT TEAM ASSIGNMENT file (#404.42) or the PATIENT TEAM POSITION ASSIGNMENT file (#404.43). The following applicable information is also contained in the mail message.

Patients Processed
Lists number of patients unassigned, number still assigned due to error, total patients, and any associated clinic discharges.

Clinic Discharges
Lists any associated clinic discharges. The position and associated clinic are displayed.

Error List
Lists those patients still assigned and the reason why.

Unassigned List
Lists those patients unassigned and, for team unassignment, unassignments which were automatically made from associated positions.

Mass Team/Position Unassignment

Example

```
Select Type of Mass Unassignment: Team// <RET>
Effective Date: T-1// <RET>  (AUG 05, 1998)
Select TEAM NAME: LIDSTER


>>> Checking to see if any team positions are associated with clinics...
---------------------------------------------------------------------------
       Team         : LIDSTER
       Position     : PHYSICIAN-ATTENDING
       Associated Clinic: 0RTHO

>>> Do you want to discharge patients from this clinic? (Yes/No) Y  YES


...SORRY, THIS MAY TAKE A FEW MOMENTS...


Mass Team Unassignment     Aug 06, 1998 08:07:09   Page:  1 of  1
  Team: LIDSTER              Total: 6 Selected: 0

Proposed Effective Date: 08/05/1998      View: ALL
     Selected Patient Name           ID             Assigned  Unassigned
1             PCMMpatient, One       000-89-0909   08/12/97
2             PCMMpatient, Two       000-12-4321   04/30/97
3             PCMMpatient, Three     666-00-9899   01/16/98
4             PCMMpatient, Four      666-87-2290   09/22/97
5             PCMMpatient, Five      000-33-4122   05/04/98
6             PCMMpatient, Six       000-44-5634   *08/24/98


     * Future Date
SA Select All      DP DeSelect Patients   VD View DeSelected
DA DeSelect All     VA View All       UN Unassign Patients
SP Select Patients    VS View Selected     QU Quit
Select Action: Quit// SA  Select All

...EXCUSE ME, JUST A MOMENT PLEASE...
```

Mass Team/Position Unassignment

```
Mass Team Unassignment     Aug 06, 1998 08:07:09   Page:  1 of  1
  Team: LIDSTER              Total: 6 Selected: 0

Proposed Effective Date: 08/05/1998      View: ALL
     Selected Patient Name         ID            Assigned  Unassigned
1    YES      PCMMpatient, One     000-89-0909  08/12/97
2    YES      PCMMpatient, Two     000-12-4321  04/30/97
3    YES      PCMMpatient, Three   666-00-9899  01/16/98
4    YES      PCMMpatient, Four    666-87-2290  09/22/97
5    YES      PCMMpatient, Five    000-33-4122  05/04/98
6    YES      PCMMpatient, Six     000-44-5634  *08/24/98


     * Future Date
SA Select All      DP DeSelect Patients   VD View DeSelected
DA DeSelect All     VA View All       UN Unassign Patients
SP Select Patients    VS View Selected     QU Quit
Select Action: Quit// UN  Unassign Patients



---------------------------------------------------------------------------
           Team Unassignment Definition
---------------------------------------------------------------------------
  Team       : LIDSTER
  Effective Date  : 08/10/1998
  # of Patients  : 6

  Clinic Discharges:  Position         Associated Clinic
             --------         -----------------
             PHYSICIAN-ATTENDING   ORTHO

Are you sure you want to continue? No// YES

Task#: 5692

Enter RETURN to continue: <RET>
```

Mass Team/Position Unassignment

Example of MailMan Message

```
Subj: Mass Team Unassignment Information [#68602] 06 Aug 98 08:07 35 Lines
From: POSTMASTER (Sender: PCMMstaff, One) in 'IN' basket.  Page 1 **NEW**
-----------------------------------------------------------------------------

Mass Team Unassignment has been completed.

       Team: LIDSTER
       User: POSTMASTER
  Effective Date: 08/06/1998

 Patients Processed
  Unassigned    : 6
  Errors/Warnings: 0  (still assigned)
  Total     : 6

Clinic Discharges:  Position           Associated Clinic
           --------           -----------------
           PHYSICIAN-ATTENDING      ORTHO

 Error List:
 ===========
  No errors to report


 Unassigned List:
 ================
 Patient              ID
 -------              --
PCMMpatient, One        000-89-0909
PCMMpatient, Two        000-12-4321
   >>> Position assignment to PCMMprovider, One was unassigned.
   >>> Position assignment to PCMMRNprovider, One was unassigned
PCMMpatient, Three      666-00-9899
   >>> Position assignment to PHYSICIAN-ATTENDING was unassigned.
     >>> Discharged from ‘ORTHO’ clinic
PCMMpatient, Four       666-87-2290
   >>> Position assignment to PCMMprovider, One was unassigned.
   >>> Position assignment to PCMMRNprovider, One was unassigned
PCMMpatient, Five       000-33-4122
   >>> Position assignment to PCMMprovider, One was unassigned.
PCMMpatient, Six        000-44-5634
   >>> Future team assignment deleted.
     Assignment Date: 08/24/98  Entry#: 3874
   >>> Position assignment to PCMMprovider, One:
     >>> Future position assignment deleted.
       Assignment Date: 08/24/98  Entry#: 2447


Select MESSAGE Action: IGNORE (in IN basket)//
```

Patient Team Position Assignment Review

Introduction

The Patient Team Position Assignment Review option makes a comparison of the entries in the PATIENT TEAM POSITION ASSIGNMENT file (#404.43) and the PATIENT TEAM ASSIGNMENT file (#404.42). It checks that the position assignment active timeframe is within the team assignment active timeframe. The current PCMM software is designed to prevent timeframe discrepancies. However, older versions of PCMM did allow these timeframe problems to occur. This report has been designed to help sites identify these problem assignments.

The report is in the form of a mail message and lists those position assignments that fall outside the team assignment active timeframe. Each entry in the mail message will display team name, position, patient name, error, position assigned/unassigned date, and team assigned/unassigned date.

You may correct timeframe discrepancies using the PCMM GUI as follows.

- From the Patient drop down menu, make sure *Show All Team Assignments* is checked.
- From the Patient drop down menu, select *Patient Assignments*.
- Enter the patient name.
- The Select Patient-Team Assignment dialog box appears. Double click on the problem Team Assignment.
- The Team-Position Assignments dialog box appears. Make note of the discharged date on the Team Assignment tab. Click on the Position Assignments tab. Double click on the problem Position Assignment.
- Enter the discharged date from above as the Unassigned Date.

Example

```
Select Team: ALL// BLUE
Select another Team: RED
Select another Team: <RET>

>>> Task#: 388578

  This task will send a MailMan message to you containing
  the results of the position assignment review.

>>> Press RETURN to continue: <RET>
```

Patient Team Position Assignment Review

```
Subj: Patient Team Position Assignment Review [#70086] 04 Sep 98 10:41 32 Lines
From: POSTMASTER (Sender: PCMMstaff, Two)  in 'IN' basket.  Page 1 **NEW**
-------------------------------------------------------------------------------

In order to correct the following active positions with discharged team
assignments, please refer to the documentation for the Patient Team Position
Assignment Review option found in the Stand-alone Options Section of the
PCMM User Guide.


  Teams Reviewed:
    BLUE
    RED


  Patient Team Position Assignments Reviewed:   12
  Number of Assignments with Problems    :   3 ( 25.00%)

 ==============================================================================
 Team: BLUE         Position: PRIMARY CARE PHYSICIAN
     Patient: PCMMpatient, Seven (1010)
      Error: Position Assigned Date is BEFORE Team Assigned Date
          Position Assigned Date: 04/25/1996
            Team Assigned Date: 04/28/1996
 ------------------------------------------------------------------------------
 Team: BLUE         Position: PRIMARY CARE PHYSICIAN
     Patient: PCMMpatient, Eight (0144)
      Error: Position Assigned Date is BEFORE Team Assigned Date
          Position Assigned Date: 08/28/1998
            Team Assigned Date: 08/30/1998
 ------------------------------------------------------------------------------
 Team: RED         Position: PHYSICIAN
     Patient: PCMMpatient, Nine (7964)
      Error: Position Unassigned Date is AFTER Team Unassigned Date
             Team Unassigned Date: 04/01/1997
           Position Unassigned Date: 07/09/1997
 ------------------------------------------------------------------------------


Select MESSAGE Action: IGNORE (in IN basket)//
```

Windows Conventions

Standard Windows Objects

These are the types of data entry fields located in standard windows forms:

Check Box
Toggles between a YES/NO, ON/OFF setting. Usually a square box containing a check mark or *x*. Clicking the box or pressing the spacebar toggles the check box setting.

Command Button
The Command button initiates an action. It is a rectangular box with a label that specifies what the button does. Command buttons that end with three dots indicate that a subsidiary screen may be evoked by selecting the command.

Date Field
Identified by "__/__/__" or a date "mm/dd/yy". Will usually have an associated popup calendar. Double clicking with the mouse inside the date edit box or tabbing to the edit box and then pressing the F2 key displays the calendar. Clicking on the desired date or using the arrow keys to move to a date and then pressing the spacebar selects the date. Each component of the date (month/day/year) must consist of two characters (i.e., 02/02/96). The selected entry will not be effective until you tab off or exit from the date field.

Drop Down List
A list box containing an arrow button on the right side which displays one entry at a time. Choose from a vertical list of choices. Select the entry you want by clicking the list entry. You cannot type in this box, only select an item from the list. Once an entry is selected, it cannot be deleted - only changed. If <None> is the last entry, selecting it will clear the list entry. If <More> is the last entry, selecting it will display additional entries. The selected entry will not be effective until you tab off or exit from the drop down list.

F2 Key
Where there is an additional action which may be taken on a field, pressing the F2 key will initiate that action.

Faded Background
Fields that appear with a faded background are currently disabled.

List Box
Box which shows a list of items. If more items exist than can be seen in the box, a scroll bar appears on the side of the box. Selecting an entry from a list box requires either double clicking the entry or single clicking the entry and pressing the spacebar.

Standard Windows Objects

Lookup Box
Choose from a vertical list of choices. By typing in a few characters and pressing the ENTER or TAB key, a list of matching entries drops down. Select the entry you want by clicking the list entry. Entering a question mark and then pressing ENTER or TAB or clicking the down arrow on an empty edit field gives a complete listing of available entries. If <More> is the last entry, selecting it will display additional entries.

Memo Field
This field is equivalent to a word-processing field.

Non-White Background
Items in fields that appear with a non-white background can be selected but cannot be modified directly in that field.

Radio Button
Radio buttons appear in sets. Each button represents a single choice and normally only one button may be selected at any one time. For example, MALE or FEMALE may be offered as choices through two radio buttons. Click in the button to select it.

Right Mouse Button or Shift F10
You may click the right mouse button or press Shift F10 for a popup box of menu items.

Tab Key
Use the TAB key or the mouse to move between fields. Do not use the RETURN key. The RETURN key is usually reserved for the default command button or action (except in menu fields).

Text Box
Type the desired characters into the edit box. The selected entry will not be effective until you tab off or exit from the text box.

Form Buttons

Buttons which appear on tab pages apply only to that tab and not the entire form. If there are action buttons on both the tab page and the form, the tab button should normally be clicked first.

Add
Anytime you reach a screen and the ADD button is enabled, you must first click the ADD button before entering any information.

Assign
Used to assign a staff member, patient, or preceptor to a position.

Autolinks - ***(This functionality has been disabled.)***
Opens the Autolinks form used to establish linkages between a team and wards/beds/clinics/practitioners, etc. (for OE/RR).

Cancel
Cancels the latest entry (up until the OK or SAVE button is clicked).

Close
Closes the window. If there are any changes that have not been saved, you will get a confirmation message asking you if you want to continue without saving; save before exiting; or cancel the close action and return to the window.

Edit
Used to edit position information.

Find
Used to quickly find an entry. Enter the search string and click the OK button.

Help
Provides help for the area you are currently working in.

New
Used to open up a dialog box from which you can enter a new team or position.

OK
Adds the new entry after the data has been entered.

Positions
Opens the Primary Care Team Position Setup form. If the team has no active positions, the New Position dialog box will appear.

Preceptor
Opens the Preceptor Assignment Add/Edit form.

Form Buttons

Save
Saves all changes made since the last save action. If you attempt to save and all required fields have not yet been completed, you will receive notification that the required fields must be completed before saving.

Search
After at least three characters are typed in a lookup dialog box, clicking the Search button will bring up matching entries.

Staff
Opens the Staff Assignment Add/Edit form.

Undo
Undoes all changes made since the last save action and redisplays the original data.

Troubleshooting Guide

Inconsistency Descriptions with Detailed Correction Instructions

1. Position with patient assignment has no staff assigned

Problem: Position exists with patients assigned to the Position, but no staff member is assigned to that Position.

Fix: Use PCMM GUI

Steps:

- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click on Staff button
- Click Assign button
- Enter name of staff member to assign to that position
- Change Effective Date if appropriate
- Click Save button

2. Patient on a Team designated PC has no PCP assigned

Problem: Patient is assigned to a Primary Care Team but has no Primary Care Practitioner assigned.

Fix: Use PCMM GUI

Steps:

- Click Patient pull down menu
- Click Patient pull down menu
- Select Patient Assignment
- Patient Lookup window opens
- Enter patient's name
- Patient – Team Assignment window opens
- Double-click team name
- Team – Position Assignments window opens
- Click on Position Assignments tab
- Click Assign button
- Double-click correct Position
- Position Information window opens
- Change Assigned Date if appropriate
- Click OK button
- Click Save button
- Close windows

Inconsistency Descriptions with Detailed Correction Instructions

Fix: Use VistA options

Steps:
- Select Appointment Management option
- Enter Patient name
- Select PC – PC Assign or Unassign action
- The following is displayed:
  1. POSITION ASSIGNMENT - BY PRACTITIONER NAME
  2. POSITION ASSIGNMENT - BY POSITION NAME
  3. TEAM UNASSIGNMENT

  Use either #1 or #2 to assign patient.
  - If you select #1: POSITION ASSIGNMENT - BY PRACTITIONER NAME
    - Position's Current PRACTITIONER: (Enter Practitioner's name)

      Hint: Type ?? to see list of Practitioners for that Team.

    - Assignment Date: TODAY// (Press Return key)
    - Are you sure? (Yes/No)? (Enter YES)
    - Position Assignment made
  - If you select #2 POSITION ASSIGNMENT - BY POSITION NAME
    - POSITION's Name: (Enter the name of the Position)

      Hint: Type?? to see list of Positions & staff assigned to that Position for that Team.

    - Assignment Date: TODAY// (Press Return key)
    - Are you sure? (Yes/No)? (Enter YES)
    - Position Assignment made

Inconsistency Descriptions with Detailed Correction Instructions

3. Patient has multiple active PCP assigned

Problem: Patient has multiple active Primary Care Practitioner assigned.
Fix: Use PCMM GUI
Steps:

- Determine wish PCP assignment is correct
- Click Patient pull down menu
- Select Patient Assignment
- Patient Lookup window opens
- Enter patient's name
- Patient – Team Assignment window opens
- Double-click team name
- Team – Position Assignments window opens
- Click on Position Assignments tab
- Highlight the incorrect Position Assignment
- Click on Edit pull-down menu
- Select Position assignment
- Click on Delete
- Confirm window opens
- Click on Yes button
- Close windows

4. Patient's AP and PCP are the same

Problem: Associate Provider and Primary Care Provider is the same staff member.
Fix: Use PCMM GUI
Steps:

- Patient Drop down menu
- Make sure "Show All Team Assignments" is checked
- Do Not check under Team drop down menu
- "Active Only" as you will want all teams to show (active or inactive)
- Under Team, Click on speed positions setup button
- Select Team
- Primary Care Position Setup screen is displayed
- Click on one of the positions (AP or PCP)
- Click on the Staff button
- Click the Inactivate button
- Assign an effective date, status and reason

> Hint: If the date of today is selected, it will not show off the Inconsistency report until Midnight as assignment changes are valid until the end of the day.

- Close

Inconsistency Descriptions with Detailed Correction Instructions

5. AP is without a Preceptor

Problem: Associate Provider is not assigned a Preceptor.
Fix: Use PCMM GUI
Steps:

- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click on Preceptor button
- Preceptor Assignment Add/Edit window opens
- Click Assign button
- Select Preceptor Position window opens
- Double click correct Preceptor
- Change Effective Date if appropriate
- Click Save
- Close windows

6. AP position is not designated for PC

Problem: Associate Provider is not listed as Can Provide Primary Care.
Fix: Use PCMM GUI
Steps:

- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click Settings Tab
- Click Can Provide Primary Care checkbox
- Click Save button
- Close windows

Inconsistency Descriptions with Detailed Correction Instructions

7. PCP position is not designated for PC

Problem: Primary Care Provider position is not listed as Can Provide Primary Care.
Fix: Use PCMM GUI
Steps:
- Click Team pull down menu
- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Active Team position
- Click Settings Tab
- Click Can Provide Primary Care checkbox
- Click Save button
- Close windows

8. Active position assignment with inactive Team Assignment/Team/Position

Problem: An active Position assignment is associated with an inactive Team.
Fix: Use PCMM GUI
Steps:
- **Determine if Team should be inactive - If YES**
- In order to correct this problem, the Team must be made active so that the patients assigned to this Team can be deleted and the Team made inactive again.
    - Click Team pull down menu
    - Click on Active only from pull down menu
    - Click Team pull down menu
    - Select Setup
    - Double Click on correct Team name
    - Click on History Tab
    - Click Add button
    - Change Effective Date if appropriate
    - Click on Reason down arrow
    - Select a reason from the drop down list
    - Click OK button
    - Click Close button
    - The Team is now active
    - (Steps necessary to delete patients assigned to this Team)
    - Click Patient pull down menu
    - Select Patient Assignments
    - Patient Lookup window opens
    - Enter Patient name
    - Double click patient name

Inconsistency Descriptions with Detailed Correction Instructions

- Select Patient – Team Assignment window opens
- Double click Team
- Click Position Assignments tab
- Highlight correct Position Assignment
- Click on Edit pull down menu
- Select Position Assignment from pull down menu
- Click on Delete from pull down menu
- Confirm Window opens
- Click Yes button
- Close window
- Make sure correct Team is highlighted
- Click Assignments pull down menu
- Select Delete from a Team from the pull down menu
- Confirm Window opens
- Click Yes button
- Close window
- (Repeat steps for each patient assigned to this Team)
- (Steps necessary to make Team inactive)
- Click Team pull down menu
- Click on Active only from pull down menu
- Click Team pull down menu
- Select Setup
- Double Click on correct Team name
- Click on History Tab
- Click Add button
- Change Effective Date if appropriate
- Click on Reason down arrow
- Select a reason from the drop down list
- Click OK button
- Click Close button
- The Team is now inactive

Inconsistency Descriptions with Detailed Correction Instructions

Steps:

- **Determine if Team should be inactive - If NO**
- The Team should not be inactive. You need to make this Team active. Follow these steps necessary to make a Team active.
    - Click Team pull down menu
    - Click Team pull down menu
    - Click on Active only from pull down menu
    - Click Team pull down menu
    - Select Setup
    - Double Click on correct Team name
    - Click on History Tab
    - Click Add button
    - Change Effective Date if appropriate
    - Click on Reason down arrow
    - Select a reason from the drop down list
    - Click OK button
    - Click Close button
    - The Team is now active

Inconsistency Descriptions with Detailed Correction Instructions

9. Active position Assignment with Inactive Team Assignment/Team/Position

Problem: An active Position assignment is associated with an inactive Position.
Fix: Use PCMM GUI
Steps:

- **Determine if Position should be inactive - If YES**
- In order to correct this problem, the Position must be made active so that the patients assigned to this Position can be deleted and the Position made inactive again.
  - (The following steps are necessary to make position active.)
  - Click Team pull down menu
  - Select Positions
  - Double Click on correct Team name
  - Team Position Setup window opens
  - Click All Positions radio button to see All Positions (active and inactive)
  - Click on correct Team position
  - Click on History Tab
  - Click Add button
  - Change Effective Date if appropriate
  - Click on Reason down arrow
  - Select a reason from the drop down list
  - Click OK button
  - Click Close button
  - (The following steps necessary to delete patients assigned to this position)
  - Click Patient pull down menu
  - Select Patient Assignments
  - Patient Lookup window opens
  - Enter Patient name
  - Double click patient name
  - Select Patient – Team Assignment window opens
  - Double click Team
  - Click Position Assignments tab
  - Highlight correct Position Assignment
  - Click on Edit pull down menu
  - Select Position Assignment from pull down menu
  - Click on Delete from pull down menu
  - Confirm Window opens
  - Click Yes button
  - Close window
  - (Repeat steps for each patient assigned to this position)

Inconsistency Descriptions with Detailed Correction Instructions

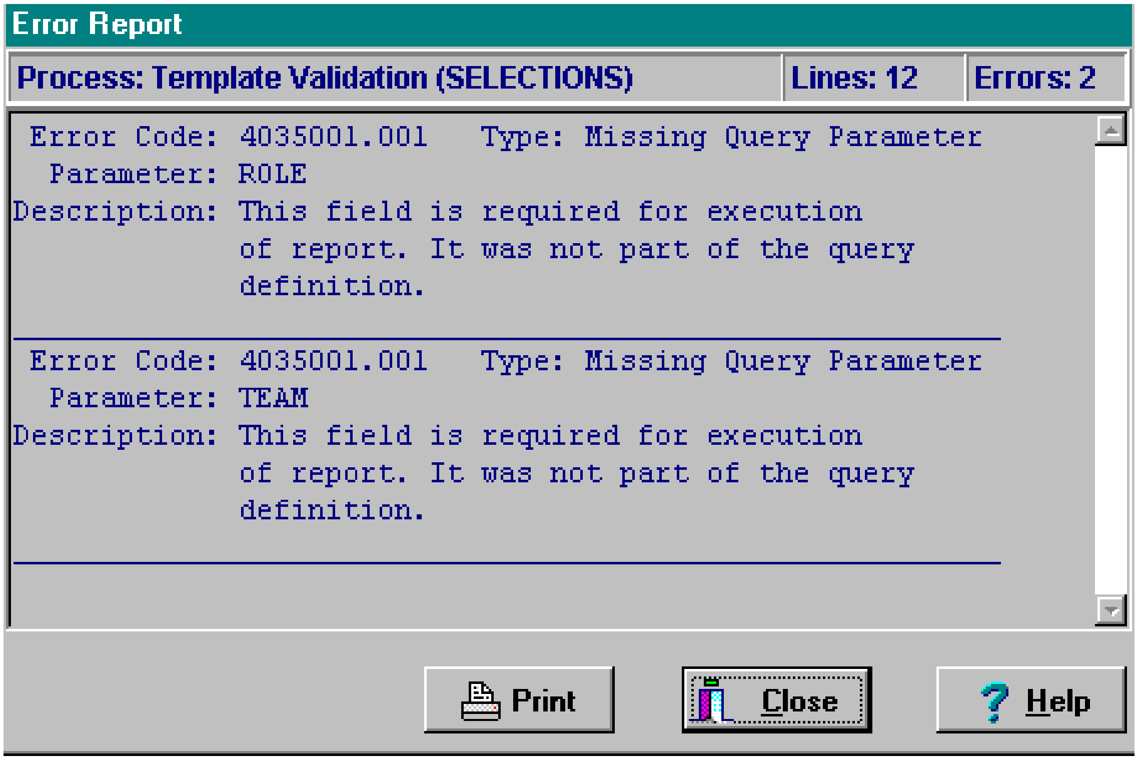
- (The following steps necessary to make position inactive)
- Click Team pull down menu
- Select Positions
- Double Click on correct Team name
- Team Position Setup window opens
- Click on correct Team position
- Click on History Tab
- Click Add button
- Change Effective Date if appropriate
- Click on Reason down arrow
- Select a reason from the drop down list
- Click OK button
- Click Close button
- Now the Position is inactive

Steps:

- **Determine if Position should be inactive - If NO**
- You need to make this Position active.
  - (The following steps are necessary to make position active.)
  - Click Team pull down menu
  - Select Positions
  - Double Click on correct Team name
  - Team Position Setup window opens
  - Click on correct Team position
  - Click on History Tab
  - Click Add button
  - Change Effective Date if appropriate
  - Click on Reason down arrow
  - Select a reason from the drop down list
  - Click OK button
  - Click Close button
  - Now the Position is active

Error Report Window

Below is an example of the Error Report Window which may appear if a specified action cannot be processed. A description of the error will appear in the window. You may print the error message. It will print to a windows device and not a VistA device.



Process - Shows what action was being taken at the time of the error.

Lines - Number of lines in the error message.

Errors - Number of errors being reported in the error message.

PCMM Business Rules

The PCMM Business Rules provide information on how some of the PCMM fields will be handled for team, team positions, and patient assignments. These rules are not intended to be all encompassing, but for general information purposes to allow some basic checking within the system to ensure data integrity.

Primary Care Team Business Rules

A Primary Care Provider is a Staff Physician, Physician Assistant, or Nurse Practitioner.
An Associate Provider is a Resident and can be a Physician Assistant and a Nurse Practitioner.

- A patient cannot have more than one primary care provider.
- A primary care provider is authorized to provide primary care and can act as a preceptor. A preceptor is a primary care provider who oversees the activities of an associate provider. The preceptor is the ultimate responsible person for the patient care provided.
- An associate provider is authorized to provide primary care, but cannot act as a preceptor.
- A staff physician is never an associate provider.
- A physician assistant (PA) and nurse practitioner (NP) can be either the primary care provider (PCP) or an associate provider (AP). However, they cannot be both for the same patient.
- An associate provider cannot be the primary care provider.
- An associate provider must have a preceptor link to a primary care provider. An associate provider is not authorized to act on his/her own.
- If a position has a preceptor assigned, that position cannot be a primary care provider or precept over another position. However, this position can and should be marked “can provide primary care”.
- If a position is marked as “can provide primary care”, the preceptor assigned to this position must also have “can provide primary care” marked.
- Primary care patient assignment cannot be made to an associate provider who does not have a preceptor assigned.
- If “can act as preceptor on Primary Care Team” is marked, then “can provide primary care” must also be marked.
- In order to be a preceptor on a primary care team, the provider must be able to provide primary care.
- Establishing a preceptor link will report the associate provider and the primary care provider as active staff members in those positions.
- The inactivation of a patient's PCMM assignment will continue even if a provider change is found.

- When attempting to remove a primary care provider (preceptor) link from an associate provider, the software will check for patient assignments. If there are patient assignments, the user will not be allowed to leave the preceptor link empty (blank). If there are no patient assignments, the preceptor link may be removed. Once a preceptor link is removed, the associate provider doesn't become the primary care provider, as the associate provider is not authorized to be the primary care provider
- Assignments are valid until the end of a day. This allows for the enforcement of the rule that a patient cannot have more than one primary care provider on a given day. (TIP: If you want to inactivate an assignment immediately, assign an inactive date of yesterday.)

Team Setup

- Required information for team setup includes team name, purpose, service, and institution. Additional data fields are optional and further define the team (phone no., description, default team printer, primary care team restrict consults, team closed, auto-assign to team from clinic, auto-discharge from team from clinic, team assignments allowed.)
- The team name can be changed, but it must be a unique entry. Any name entered to replace an existing team name will be checked. If there is already a team with that name, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.
- The deletion of any team is not permitted once a history entry has been established. Once a team is in use, you may inactivate it, but not delete it. If you attempt to delete, you will be given the warning message "The following conditions prevent deletion: History entries are entered".

Team History

- When adding a new entry to the team history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a team that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries of the same status.
- You can only delete the latest date entry in the history list. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The "reason" for any history entry can be changed.
- The status cannot be changed for an existing entry. There are only two status values, active and inactive.
- In order for a team to be inactivated, all positions and staff assignments must be inactivated.

Team Position Setup

- General required information for position setup includes position, role, and message notifications. Additional data fields are optional and further define team purpose (description, beeper, can provide primary care, can act as a preceptor, associated clinic, and number of patients allowed for position).
- See the Primary Care Team Business Rules concerning associate provider and positions that can act as a preceptor on a primary care team.
- The position name can be changed, but it must be a unique entry within the team. You can use the same name for any number of different teams, but not within the same team. Any name entered to replace an existing name will be checked. If there is already a position with that name within the team, whether active or inactive, replacement will not be allowed. You will be asked to confirm all name changes.
- The deletion of any position is not permitted.
- If a position is created in error, you will be able to remove it up until you assign a patient to it, or change its current status. Once a position is in use, you may inactivate it, but not delete it.

Team Position History

- When adding a new entry to the team position history, the effective date, status, and reason for the entry must be completed before the entry can be saved.
- When adding a new entry, the effective date for the new entry cannot be earlier than a previous entry in the history. For example, a new entry that would reactivate a position that was inactivated on September 1, could not have a date earlier than September 1.
- You cannot have two consecutive entries with the same status.
- If you inactivate a position and there is a staff member currently active in the position, a warning message will display stating that the Team Member is Active in Position.
- You can only delete the latest (last) history entry. Once another entry has been made which supersedes a previous entry, that entry can no longer be deleted.
- The date for an existing entry can only be changed if it does not conflict with any of the other entries in the history. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The “reason” for any history entry can be changed.

Team Position Staff History

- Only one staff member can be assigned to a position at any given time.
- If there already is an active staff member, you will only be allowed to inactivate the current staff member.
- The status cannot be changed for an existing entry. There are only two status values, active and inactive.
- When assigning a new staff member to a team position, the member's name, effective date, status, and reason for the assignment must be completed before the assignment can be entered.
- When adding a new staff member to a position, the effective date for the new assignment cannot be earlier than the inactivation date of the previous assignment.
- Only the last assignment entry can be deleted.
- The date for an existing assignment can only be changed only if it does not conflict with any of the other assignment entries. Since there may be other packages using this data in the future, changing a date could cause potential problems. Date changing should be reserved for only those occasions when an entry was made in error. If you change an existing date, you will be asked to confirm it.
- The "reason" for any history entry could be changed.
- The "status reason" for an existing entry may be changed only if it is the latest assignment entry in the Assignment History log and has a status of inactive.

Patient Team Assignment

- The Inconsistency Report displays patients that are assigned to a primary care team without a position assignment. The assignments that are identified will require action.
- Only teams that have the "Primary Care Team" box checked on the Settings Tab of the Team Setup Screen may be assigned as a primary care team. **Note:** This field determines if a team can ever be a primary care team. The team's purpose does not affect the ability of a team to function as a primary care team.
- A patient can only be assigned to one primary care team on any given date.
- A patient can be assigned to more than one non-primary care team.
- In the Multiple Patient Assignments to a Team option, patients currently assigned to the destination team are not listed in the "Available to Assign" list as they are already assigned to that team.
- In the Multiple Patient Assignments to a Team option, if "Make this a Primary Care Team Assignment" is checked, patients who do not have a primary care team will be assigned this team as their primary care team. Patients who have already been assigned to another team as their primary care team will not be assigned to the team.

Patient Team Position Assignment

- In order for a position to be designated as the primary care practitioner position, the following conditions must exist:
  the team must be able to provide primary care
  the team must be designated as the patient’s primary care team
  the position must be able to provide primary care
  the patient can have no other position designated as primary care practitioner.
- See the Primary Care Team Business Rules concerning associate provider and positions that can act a preceptor on a primary care team.
- A patient cannot have more than one primary care provider on any given date.
- Only positions from the patient's primary care team may serve as the primary care provider.
- In multiple patient assignment, the assignment will fail if the patient is already assigned to a primary care team or a primary care position.
- In multiple patient assignment, the assignment will fail if a death entry has been entered for the patient.
- In the Multiple Patient Assignments to a Position option, selected patients who have not yet been assigned to the position's team and are permitted to be assigned to the position (e.g., no conflicts with primary care assignments) will be assigned to the team at the same time.
- Assigning patients by using the Multiple Patient Assignment to a Position option automatically enrolls patients to the team with which the position is assigned.

Processing Team Reassignments

- Team reassignment must be made from a source team to a destination team.
- Team reassignment from a source team to a destination team can be made when the team exists now or in the future.

Processing Position Reassignments

- Position reassignment must be made from a source position to a destination position.

Security Key Changes

The PCMM security key assignments to the VistA PCMM Main Menu, along with its associated menus and options, have been changed as recommended by the PCMM User Workgroup.

Security key changes as of August 2007

The following options no longer require a security key.

SCMC EXTENDED REPORT
SCMC FLAGGED
SCMC INACTIVATED REPORT

SCMC PRACTITIONER FLAGGED
SCMC PC STAFF AUTO INACTIVATE
SCMC PCMM MAIN MENU

To access the following options, the user will need the SC PCMM SETUP security key.

SCMC PCMM NIGHTLY TASK
SCMC RETRANSMIT
SCMC PCMM ERR CODE REPORT
SCMC EXTEND A PATIENT

To access the following options, the user will need the SCMC PCMM RETRANSMIT security key.

SCMC PCMM TRANS ERROR PROC
SCMC PCMM TRANS ERROR REPORT

Glossary

ACOS	Associate Chief of Staff
ADMIN COORDINATOR	The administrative coordinator for Primary Care and Non-Primary Care Teams. This person is involved with administrative (MAS requirements and/or Clinic Administration) duties as well as oversight of the Scheduling process and Primary Care team definition.
ARROW	Arrow is a symbol (⇩ ⇧ ⇦ ⇨) that is used to scroll up and down lists, and left to right for moving objects.
ASSOCIATE PROVIDER	An Associate Provider is authorized to provide primary care, but cannot act as a Primary Care Provider. In PCMM, a Resident is designated as an Associate Provider. A Nurse Practitioner and/or Physician Assistant may be designated as an Associate Provider also. Per VHA Directive, every patient is to be assigned to a Primary Care Provider who is responsible for coordinating a patient's overall care. The Associate Provider on a Primary Care Team must be assigned to a preceptor who can be a Primary Care Provider (must have a Primary Care Provider preceptor assigned to them).
AUSTIN INFORMATION TECHNOLOGY CENTER (AITC)	The central repository for National Care Patient Care Database (formerly the Austin Automation Center (AAC)).
AUTO TEAM ENROLLMENT/DISCHARGE	This is an option when setting up teams that will automatically enroll a patient to a team when the patient is enrolled in a clinic that is associated with that team. You can also discharge from a team (if not assigned to a position in a team) when the patient is discharged from a clinic associated with that team.
BUTTON BAR	Small boxes that contain graphic figures that represent various functions. Also referred to as Tool Bar.
CALENDAR DISPLAY	Within PCMM, when there is a date field, the user can "double click" the field and a miniature calendar will 'pop up' for selection of a date and year. This is used for activation and deactivation dates as well as discharge dates.
CLERK	This person is a clerk who performs data entry.
CLINICAL PHARMACIST	Performs patient care duties related to patient medications as assigned or granted by the appropriate governing committee at the facility. These privileges may include and may or may not be limited to: (1) Initiation of renewal orders for chronic maintenance medications (2) Initiation of orders for laboratory tests necessary to monitor existing drug therapy.
CLINICAL SERVICE	A Service defined at the medical center, e.g. MEDICINE, SURGERY, INTERMEDIATE MEDICINE, etc.
CLOSING	Another term for 'inactivating' a position or team.
CONSULTS	When a patient is referred to a clinic on a one-time basis, he/she is not normally enrolled in that clinic.
CONTROL KEY	A Control Key is the key on the lower left and right hand side of the keyboard that is entitled 'CTRL'. When a user presses this key along with another character (e.g. CTRL + O), the user can select and OPTION, etc.
DATABASE	This refers to the information that is stored in your medical center's computer program, e.g., patient information, service information, clinic information, etc.

DIALOGUE BOX	A dialogue box is a box or window that is placed within a screen that allows the user to enter a 'free text' message or description of the object being created (in some cases, the description of what a team is supposed to represent).
DIETITIAN	Performs patient care duties related to nutrition and weight management
DISPLAY BOX	This is a 'box' or window that 'DISPLAYS' information or lists available clinics, positions or teams to choose from. The user may select an item from the list displayed.
DOUBLE ARROW	A 'double arrow' is just that (two arrows next to each other) indicating that more than one patient name may be moved over from an inactive status to an active status and back to an inactive status. (>>)
DROP DOWN LIST	When a user selects an item from the MENU BAR, a list is displayed in a vertical format. For example, if a user selects FILE, a list drops down showing all options that are available under the main heading FILE: File, Edit, Print, Save
E-MAIL MESSAGES	These are the messages that are generated by a software event that delivers information to designated users via MailMan. E-mail messages in the PCMM module would include information about death notifications, inpatient movements, consult notifications, and team notifications or changes.
ENHANCEMENT	An 'enhancement' to an already existing Class I software package is the introduction of new or improved functionality.
GUI	Graphical user Interface
FTEE	Full Time Employee Equivalent. Applies to any staffed team position.
HIGHLIGHT	To 'Highlight' a name, team, position, or date, one would place the cursor (or arrow) on the name, team, or position they wish to choose and 'click' the mouse button to select it or highlight it.
HISTORY FILE	Although not specific to any one document, a history file is a compilation of various pieces of information pertaining to individual teams, positions, etc. for future reference and clarification.
ICON	An Icon is an image or snapshot of something that is visually understood and is represented in a 'box'. For instance, an ICON that stands for 'cutting' a piece of text out of a document would be a box with a picture of a pair of scissors in it. They are also known as 'buttons'.
INTERN (PHYSICIAN)	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include, but may not be limited to, (1) completing history & physical examinations, (2) obtaining blood and other specimens, and (3) provision of patient medical care as permitted. Cannot act as Primary Care Provider. The Intern is an Associate Provider within a Primary Care Team (see Associate Provider Term).
IRM	Information Resources Management
LOG OFF	This is referred to logging off or signing out of a particular software package or system. To end the session, to 'get out' of a package, etc.
LOG ON	This is referred to logging on or signing onto a particular software package or system. To open or start a new session.
MACRO	A shortcut for performing various tasks. For example, the CTRL key (as explained above), combined with certain letters performs functions or tasks without having to select a menu bar item.
MAS ADPAC	Medical Administration Service Automated Data Processing Applications Coordinator
MEDICAL STUDENT	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner.

MENU BAR	A Menu Bar is usually listed at the TOP of a computer screen and it, unlike the tool bar, displays words as opposed to pictures. For example, the menu bar for FILE OPEN can be selected, but it can also be selected from a picture of a folder opening. The menu bar is just the ‘words’ for various functions. The menu bar as ‘drop down lists’ as explained above.
MODULE	A portion of a major software package, e.g. Primary Care functionality is considered a MODULE of the Scheduling package.
NPCD	National Patient Care Database - is maintained in Austin and receives selected demographic and encounter-based clinical, diagnostic data form VA medical centers. This data enables a detailed analysis of VHA inpatient and outpatient health care activity.
NURSE (LPN)	Provides a variety of nursing services that do not require full professional nurse education, but are represented by the licensing of practical and vocational nurses by a State, Territory or the District of Columbia. Persons in these positions may also provide administrative assistance, such as making appointments, etc.
NURSE (RN)	Provides care to patients in clinics and other settings, administers anesthetic agents and supportive treatments to patients undergoing outpatient surgery and other medical treatments, promotes better health practices, and consults or advises nurses providing direct care to patients. Persons in this position require a professional knowledge and education in the field of nursing.
NURSE PRACTITIONER	Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, appropriate assessments, orders diagnostic tests and consultations as necessary, prescribes treatment interventions in accordance with established protocols, provides or arranges follow-up care, and provides health teaching and supportive counseling. Is authorized to act as a Primary Care Provider or Associate Provider. The ability to act as a Primary Care Provider is decided by individual facilities.
OIF/OEF	Operation Iraqi Freedom/ Operation Enduring Freedom
OTHER	A general classification for those team members who do not belong in any of the listed Standard Position entries.
PANEL	A panel is a group of individual patients for which the Primary Care Provider has accepted primary care responsibility.
PATIENT PANEL	Group of individual patients assigned to Team/Position/ Practitioner. Can be either Primary Care or Non Primary Care patients; e.g., the Practitioner’s Patients Report includes both Primary Care and Non Primary Care patients assigned to the practitioner or other team position in the Patient Panel Count.
PATIENT SERVICES ASSISTANT	Provides clerical and patient processing support to outpatient clinics, or other unit of a medical facility, in support of the care and treatment given to patients. This includes duties as receptionist, record-keeping duties, clerical duties related to patient care, and miscellaneous support to the medical staff of the unit.
PC COORDINATOR	Primary Care Coordinator
PCMM	Primary Care Management Module
PCs	Personal computers
PERSON CLASS FILE	Consists of provider taxonomy developed by Health Care Finance Administration (HCFA). The taxonomy codifies provider type and provider area of specialization for all medical related providers.

PHYSICIAN ASSISTANT	Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, diagnostic and therapeutic medical care and services, taking case histories, conducting physical examinations, and ordering lab and other studies. Physician Assistants also may carry out special procedures, such as giving injections or other medication, apply or change dressings, or suturing minor lacerations. The ability to act as a Primary Care Practitioner is decided by individual facilities.
PHYSICIAN-PRIMARY CARE	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. As a Primary Care practitioner, the incumbent provides the first point of assistance for a patient seeking care. Primary Care duties include: (1) Intake and initial needs assessment, (2) Health promotion and disease prevention, (3) Management of acute and chronic biopsychosocial conditions, (4) Access to other components of health care, (5) Continuity, and (6) Patient and non-professional care giver education & training. (from IL 10-93-031, Under Secretary for Health's Letter) Can act as Primary Care Practitioner.
PHYSICIAN-PSYCHIATRIST	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) in regard to the practice of Psychiatry.
PHYSICIAN-SUBSPECIALTY	As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) concerning the practice of Specialty or Subspecialty care in the areas of Medicine or Surgery.
POSITION	Teams are comprised of one or more staff positions. Individual practitioners are assigned to a team position. A position is designated to serve certain roles in the overall primary care setting.
PRECEPTOR	Responsible for providing the overall care for patients assigned to an Associate Provider or Medical Student. On Primary Care Teams, the Preceptor must be able to provide Primary Care.
PRIMARY CARE	Primary care is the provision of integrated, accessible health care services by clinicians that are accountable for addressing a large majority of personal health care needs.
PRIMARY CARE MANAGEMENT MODULE (PCMM)	Primary Care Management Module is the application for VA facilities to use for implementing primary care teams. Teams are created, positions associated with the teams are created, staff members are assigned to positions, and patients are assigned to the teams and positions.
PRIMARY CARE PROVIDER	In PCMM, the Primary Care Provider is the position determined to be responsible for the coordination of the patient’s primary care.

PSYCHOLOGIST	Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family and group counseling and psychotherapy, assertiveness and other behavior training, etc.
REHAB/PSYCH TECHNICIAN	Provides patient care in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family or group counseling. A degreed Psychologist or Mental health practitioner typically supervises the incumbent.
RESIDENT (PHYSICIAN)	Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include, but may not be limited to, completing history and physical examinations, obtaining blood and other specimens, and provision of patient medical care as permitted. The resident is an Associate Provider within a Primary Care Team. As a Resident, the incumbent is responsible for providing patient care as directed by the Preceptor. Cannot act as Primary Care Provider.
RIGHT CLICK	Normally on a computer 'mouse' there is two buttons at the top of the mouse. The button or area that can be 'clicked' on the right, is known as the RIGHT CLICK button.
ROLE	A function or task of a staff member involved with the implementation, maintenance and continued success of primary care.
SOCIAL WORKER	Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Social Work. Provides direct services to individuals, groups and families with counseling, discharge planning, crisis intervention, etc.
SPECIALTY CLINICS	A set of clinics that are defined as SUBSETS of generalized Service clinics such as Cardiology (specialty of Medicine); Orthopedics (specialty of Surgery), etc.
TEAM	Teams are groups of staff members organized for a certain purpose (e.g., Primary Care).
TEAM PHARMACIST	A pharmacist who: (1) Is authorized to Fill/Dispense medications (2) Enter/Verify medication orders (3) Provide patient education relating to medications (4) Renew established medications under the protocols defined by the medical center.
TEAM PROFILE	This is a screen within PCMM that shows the various characteristics of a particular team, e.g., number of patients allowed for enrollment, name, positions assigned, etc.
TEXT BOX	The text box is also known as the DIALOGUE box as described above. It provides the user with an area in which to identify certain characteristics of a particular component of PCMM. For example, the description of what a team is for (provides primary care to patients that have been discharged from the hospital within the last 6 months).
TITLE BAR	Title bar is the bar that shows the TITLE of the screen that the user is presently accessing. For instance, the TITLE BAR on the Team Set-Up screen could be 'Team Profile'.
TOOL BAR	The Tool Bar is what is displayed either at the top of the screen or at the button, and contains a picture of all of the available ICONS that may be chose to perform certain tasks. Unlike the MENU BAR, the menu bar contains the 'words' for functions, whereas the TOOL BAR contains the 'pictures' that represent functions.
TOOL BUTTONS	A tool button is ONE of the icons that is shown across the top (or bottom) of a screen on the TOOL BAR.

TPA	Transition Patient Advocates assist in tracking the treatment of seriously ill veterans of Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF)
UNIQUES	Uniques for the purpose of PCMM Primary Care are defined as the individual veteran (patient) enrolled in VA health care that makes up the primary care provider's panel.
USER CLASS	User Class is a file that will be transported with the Primary Care Management Module that stores the users (physicians, social workers, staff clerks, etc.) actual position titles as defined by the site.
VistA	Veterans Health Information Systems and Technology Architecture, formerly known as Decentralized Hospital Computer Program, encompasses the complete information environment at VA medical facilities.

Appendix - Examples of PCMM Reports

This section provides brief examples of PCMM Reports. Selecting different options will change the content of the reports. All of the data included in the sample reports is for illustration purposes – No live data is used. Actual Reports will be much longer.

Team/Position Assignment/Re-Assignment

Note: This option may be used to assign or reassign a patient to a team. It does not generate a report.

```
Prior to using this option, PCMM's Graphical User Interface (GUI)
must be used to:
    1) Setup active primary care and non-primary care team(s)
    2) Setup active PC and non-primary care Practitioner position(s)
    3) Setup any necessary preceptor/preceptee relationships
    4) Assign practitioner to position(s)

A patient can only have one PC team and one
PC Position assignment on a given day.  The patient must be
assigned to a position's team to be assigned to the position.

Note: You must use the PCMM GUI if the patient was:
    o unassigned from PC assignment today or in the future
    o assigned to a future PC assignment.
```

Patient Listing for Team Assignments

```
Printed on: 3/22/2006                    Patient Listing For Team Assignments                              Page: 1

Division: CHEYENNE VAMC

Team:  GRAY TEAM                 Primary Care Team: YES

                          Date
Patient Name         Pt ID  Assigned    PC?   Practitioner        Position            Standard Role           Preceptor
=====================================================================================================================
PCMMPATIENT, SIX     2210   10/12/2001  PCP   PCMMPROVIDER, SIX   PROV GRAY1          PHYSICIAN-PRIMARY CA
PCMMPATIENT, EIGHT   2752   04/13/2000  PCP   PCMMPROVIDER, SIX   PROV GRAY1          PHYSICIAN-PRIMARY CA
PCMMPATIENT, THREE   1301   06/14/2005  PCP   PCMMPROVIDER, SIX   PROV GRAY1          PHYSICIAN-PRIMARY CA
```

Patient Team Position Assignment Review

```
>>> Task#: 1911
    This task will send a MailMan message to you containing
    the results of the position assignment review.
Subj: Patient Team Position Assignment Review  [#337] 03/22/06@11:30  1257 lines
From: POSTMASTER  In 'IN' basket.   Page 1  *New*
-------------------------------------------------------------------------------
  In order to correct the following active positions with discharged team
assignments, please refer to the documentation for the Patient Team
Position Assignment Review option found in the Stand-alone Options
Section of the PCMM User Guide.
   Teams Reviewed:
       BLUE TEAM
       GRAY TEAM
       GREEN TEAM BRAVO

   Patient Team Position Assignments Reviewed:  12290
   Number of Assignments with Problems       :    207  (  1.68%)

 ==============================================================================
 Team: BLUE TEAM              Position: NURSE BLUE 1
         Patient: PCMMPATIENT, FIVE (6115)
           Error: Position Unassigned Date is AFTER Team Unassigned Date
                         Team Unassigned Date: 03/15/2006

Subj: Patient Team Position Assignment Review  [#337]   Page 2
-------------------------------------------------------------------------------
                     Position Unassigned Date: 03/18/2006
 ------------------------------------------------------------------------------
 Team: BLUE TEAM              Position: PROV BLUE 1
         Patient: PCMMPATIENT, EIGHT (3551)
           Error: Position Assigned Date is BEFORE Team Assigned Date
                    Position Assigned Date: 08/30/2000
                        Team Assigned Date: 10/05/2000
 ------------------------------------------------------------------------------
 Team: BLUE TEAM              Position: PROV BLUE 1
         Patient: PCMMPATIENT, SEVEN (4587)
           Error: Position Assigned Date is BEFORE Team Assigned Date
                    Position Assigned Date: 04/26/1999
                        Team Assigned Date: 10/12/1999
```

Historical Patient Position Assignment Listing - Detail

```
                               Detail for Patient Position Assignments
---------------------------------------------------------------------------------------------------------------
                                   <*>  HISTORICAL PATIENT POSITION ASSIGNMENT LISTING  <*>
                          Detail for Patient Position Assignments Effective: MAR 23,2006 to MAR 23,2006
---------------------------------------------------------------------------------------------------------------
Date printed: MAR 23,2006@14:29                                                                         Page: 1
---------------------------------------------------------------------------------------------------------------
                   Pat.   Primary    MT                                                  Enrolled
Patient Name       Id.    Elig.      Cat  Team         Provider         Team Position    PC?  Clinic         Act. Date   Inac. Date
------------------ -----  ---------  ---  ------------ --------------   --------------   ---  -------------- ----------  ----------
PCMMPROVIDER, SIX  8663   SC < 50     N   BLUE TEAM    PCMMPROVIDER, TEN  PROV BLUE 1    PCP                 09/02/2003
PCMMPROVIDER, ONE  6497   NSC         C   BLUE TEAM    PCMMPROVIDER, TEN  PROV BLUE 1    PCP                 09/02/2003
PCMMPROVIDER, TEN  7460   SC 50-100       BLUE TEAM    PCMMPROVIDER, TEN  PROV BLUE 1    PCP                 09/02/2003
---------------------------------------------------------------------------------------------------------------
NOTE: More than one provider may be associated with a single patient position assignment.  This output returns a separate output
      line for each related provider during the date range selected.

      'PC?' represents provider type:  AP = Associate provider, PCP = Primary Care Provider, NPC = Non-Primary Care Provider.
---------------------------------------------------------------------------------------------------------------
```

Historical Patient Position Assignment Listing - Summary

```
                    Summary for Patient Position Assignments
--------------------------------------------------------------------------------
                <*>  HISTORICAL PATIENT POSITION ASSIGNMENT LISTING  <*>
       Summary for Patient Position Assignments Effective: MAR 23,2006 to MAR 23,2006
--------------------------------------------------------------------------------
Date printed: MAR 23,2006@14:29                                          Page: 63
--------------------------------------------------------------------------------

                                    Category      Count   Percent
              ----------------------------------------  --------  --------

                      --PRIMARY ELIGIBILITY--
                            AID & ATTENDANCE         2      0.40
                                     CHAMPVA         3      0.61
                      HUMANITARIAN EMERGENCY         1      0.20
                            NSC, VA PENSION         14      2.83
                                         NSC       255     51.62
                      PURPLE HEART RECIPIENT         3      0.61
                           SC LESS THAN 50%        151     30.57
                 SERVICE CONNECTED 50% to 100%      64     12.96
                                     TRICARE         1      0.20

--------------------------------------------------------------------------------
NOTE: More than one provider may be associated with a single patient position assignment.  The sum of assignments related to
      providers detailed in this summary is likely to be greater than the actual number of patient position assignments
      returned by this report.
--------------------------------------------------------------------------------
```

Patients Scheduled for Inactivation from PC Panels

```
Patients Scheduled for Inactivation from PC Panels                                        MAR 23,2006  14:41    PAGE 1
                                                                                         Date
                                                                                         Sched. to
Patient Name    SSN   Institution       PC Team         Provider          Team Position    Inactivate   Next Appt. Date/Clinic
------------------------------------------------------------------------------------------------------------------------------

PCMMPATIENT, ONE   3822  CHEYENNE VAMC     BLUE TEAM      PCMMPROVIDER, TEN   PROV BLUE 2    03/18/06     MAR 30,2006@08:00 PODIATRY
PCMMPATIENT, TWO   0750  CHEYENNE VAMC     BLUE TEAM      PCMMPROVIDER, TEN   PROV BLUE 2    03/16/06
PCMMPATIENT, SIX   1437  CHEYENNE VAMC     BLUE TEAM      PCMMPROVIDER, SIX   PROV BLUE 3    03/16/06
PCMMPATIENT, TEN   3965  CHEYENNE VAMC     BLUE TEAM      PCMMPROVIDER, ONE   PROV BLUE 6    03/22/06     APR 12,2006@09:00 ELDRED REM
PCMMPATIENT, FOUR 9659  CHEYENNE VAMC     GREEN TEAM     PCMMPROVIDER, TWO   PROV GREEN 4   03/22/06     JUN 7,2006@09:00  EVANS REMI
```

Patients with Extended Primary Care Inactivation

```
PCMM Patients with extended Inactivations                                                      MAR 23,2006  14:50    PAGE 1
                                                                                            Date
                                                                                            Sched.
                                                                                            for
                                                              Provider/        Preceptor/   Inactivation/
Patient          SSN    Institution      PC Team          Position         Position     Reason
-------------------------------------------------------------------------------------------------------------------------------

PCMMPATIENT, ONE  2847   CHEYENNE VAMC    BLUE TEAM        PCMMPROVIDER, TWO              03/19/06
                                                          PROV BLUE 1                    PATIENT HAS FUTURE PC APPOINTMENT
PCMMPATIENT, TWO  8539   CHEYENNE VAMC    BLUE TEAM        PCMMPROVIDER, SIX              03/19/06
                                                          PROV BLUE 2                    PATIENT CONTACTED SITE FOR APPOINTME
PCMMPATIENT, SIX  3822   CHEYENNE VAMC    BLUE TEAM        PCMMPROVIDER, SIX              03/21/06
                                                          PROV BLUE 2                    PROVIDER REQUEST-WILL CONTACT PATIEN
---------------
COUNT 3
-------------------------------------------------------------------------------------------------------------------------------
Column Heading        Explanation of column headings

Patient Name          Name of patient scheduled to be inactivated from their primary care team and position/provider.
SSN                   Patient's last 4 SSN numbers.
Institution           Institution name, previously called Division, in which patient receives primary care.
PC Team               The patient's assigned Primary Care team in PCMM.
Provider/             Name of Associate Primary Care Provider (AP) assigned to patient, if there is one.
 Team Position        The name of the team position to which the Associate Primary Care Provider (AP) is assigned.
Current Preceptor/    Name of Primary Care Provider (PCP) assigned to patient.  Every Primary Care patient should
 Team Position        be assigned to one PCP. The name of the team position to which the Primary Care Provider (PCP)
                      is assigned.
Date Scheduled for    Date patient will be inactivated from PCMM and their Primary Care team and provider/position unless
 Inactivation         they have a completed outpatient appointment encounter with their current PCP or AP before this date.
                      Note: There is a patient reassignment option, which allows an inactivated patient to be reactivated
                      to their previous Primary Care team and position if they return for care.
Reason for Extended   The reason entered for extending the patient's time before inactivation from PC panels.
 Inactivation         Entry of this field is in the PCMM GUI, Patient drop down menu, and the Extend Patient's Date for
                      Inactivation from PC Panels option.
```

Patients Automated Inactivations from PC Panels

AUTOMATED PATIENT INACTIVATION FROM PRIMARY CARE PANELS REPORT MAR 23,2006 14:52 PAGE 1

Patient Name	SSN	Institution	PC Team	Provider/Team Position	Preceptor/Team Position	Date PT Inactivated	Reason Patient Inactivated
PCMMPATIENT, FOUR	2015	CHEYENNE VAMC	FORT COLLINS TE	PCMMPROVIDER, SEVEN PROV FC2		02/22/06	NO APPT
PCMMPATIENT, TEN	0860	CHEYENNE VAMC	FORT COLLINS TE	PCMMPROVIDER, SEVEN PROV FC2		02/22/06	NO APPT
PCMMPATIENT, NINE	8056	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, FIVE PROV BLUE 1		02/22/06	NO APPT
PCMMPATIENT, NINE	3161	CHEYENNE VAMC	BLUE TEAM	PCMMPROVIDER, TEN PROV BLUE 2		02/22/06	NO APPT

REPORT KEY

Field Name	Explanation of field name
Patient Name	Name of patient scheduled to be inactivated from their primary care team and position/provider.
SSN	Patient's last 4 SSN numbers.
Institution	Institution name, previously called Division, in which patient receives primary care.
PC Team	Patient's assigned Primary Care team in PCMM.
Provider/	Name of Primary Care practitioner/provider currently assigned to the patient. This may be an Associate PC Provider (AP,) if the patient is assigned to an AP, or it may be a Primary Care Provider (PCP) if the patient is not assigned to an Associate PC Provider (AP.)
Team Position	The name of the team position to which the current provider is assigned.
Preceptor	Name of Preceptor/Primary Care Provider (PCP) if the patient is assigned to an Associate Provider. If this field is blank then the patient is assigned to a PCP, who displays in the Provider field.
Date Patient Inactivated	Date patient was inactivated from PCMM and their Primary Care team and provider/position. Note: There is a PCMM patient re-assignment option.
Reason Patient Inactivated	Reason for patient's automated unassignment from their Primary Care team and provider/position. No Appt The patient has been assigned to their current Primary Care Provider (PCP) for 12 months, and does not have a completed appointment encounter with their PCP or any assigned Associated Primary Care Provider (AP) within those 12 months. Therefore, they are considered an inactive patient. Alternatively, the patient has been assigned to their current PCP for at least 12 months, and does not have a completed appointment encounter with their PCP or any assigned Associated Primary Care Provider (AP) in the past 24 months. Therefore, they are considered an inactive patient. Death - Patient's death, a date of death was entered in the Registration Package

Extend Patient Inactivation Date

Note : By selecting this option and specifying one or more teams, a list of patients scheduled for inactivation is generated. Choose patients from this list , one at a time, to automatically extend the inactivation date for 60 days.

```
Select PATIENT REPORTS AND OPTIONS Option: EXTP  Extend Patient Inactivation Date
Select TEAM NAME: BLUE
     1   BLUE TEAM
     2   BLUE TEAM BRAVO
CHOOSE 1-2: 1  BLUE TEAM
Searching...

Select From:

 1 PCMMPATIENT, TWELVE
 2 PCMMPATIENT, EIGHT
 3 PCMMPATIENT, SIX
 4 PCMMPATIENT, THIRTEEN
 5 PCMMPATIENT, THREE
 6 PCMMPATIENT, NINE


Select 1-16 2
EXTEND AUTOMATIC INACTIVATION: DO NOT EXTEND// ?
     Enter if you wish to extend this automatic inactivation date by 60 days
     Choose from:
       0        DO NOT EXTEND
       1        PATIENT HAS FUTURE PC APPOINTMENT
       2        PROVIDER REQUEST-WILL CONTACT PATIENT
       3        PATIENT CONTACTED SITE FOR APPOINTMENT
       4        OTHER
```

PCMM Edit Practitioner in Position Assig. File

Note: This option will allow the use to edit an invalid Practitioner Entry if any invalid Entries exist.

```
PCMM Edit Practitioner in Position Assig. File

Select PROVIDER/POSITION REPORTS AND OPTIONS Option: EP  PCMM Edit Practitioner in Position Assig. File


                       EDITING INVALID PRACTITIONER ENTRY

No Entries found
```

Practitioner Demographics

Note: After selecting one or more Practitioners, demographic information is displayed.

```
Printed on: 3/27/2006     Practitioner Demographics                    Page: 2

   Name: PCMMPROVIDER, TWELVE           Serv./Sect.: MEDICAL SERVICE - PROVIDER
   Team: GREEN TEAM                     Position: PROV GREEN 3
   Role: PHYSICIAN-PRIMARY CARE         User Class:
   Room:                                Pts. Allowed: 240
   Phone: 7177                          Pts. Assigned: 226
   Assoc.
   Clinic: Osteo Clinic
   Person
    Class: Allopathic and Osteopathic Physicians
              Internal Medicine
```

Practitioner's Patients

```
Printed on: 5/1/2006       Practitioner's Patients                  Page: 1

        Team: BLUE TEAM CHANGED
    Division: CHEYENNE VAMC
Practitioner: PCMMPROVIDER, SEVEN (PROV BLUE 7)

                           M.T.  Prim       Last        Next
Pt Name             Pt ID  Stat  Elig       Appt        Appt        Clinic
=================================================================================

PCMMPATIENT, SIX    6029   A     NSC        12/16/2005  06/14/2006  CARDIO
PCMMPATIENT, SEVEN  8189   A     NSC        10/05/2005  09/13/2006  CARDIO
PCMMPATIENT, EIGHT  6972         SC < 50    09/09/2005              CARDIO
PCMMPATIENT, NINE   9824         CHAMPVA    05/24/2005              CARDIO
PCMMPATIENT, TEN    9640   C     NSC        07/23/2004              CARDIO
```

Historical Provider Position Assignment Listing

```
                          Detail for Provider Position Assignments Effective: APR 1,2006 to MAY 1,2006
-----------------------------------------------------------------------------------------------------------------------------------
Date printed: MAY 1,2006@16:20                                                                                          Page: 1
-----------------------------------------------------------------------------------------------------------------------------------
                                                                                         Max.  ---Assigned---         ---Precepted--
                                                                                         Pts.  ---Patients---   Open  ---Patients---
Provider Name         Position            PC?  Team                  Associated Clinic  Allow.  PC      Non-PC   Slots  PC      Non-PC
--------------------  ------------------  ---  --------------------  -----------------  ------  ------  ------  ------  ------  ------
PCMMPATIENT, ONE      HBPC PROVIDER 11    YES  HOME BASED PC TEAM    NUTRITION             5       1       0       4       0       0
PCMMPATIENT, TWO      PROV GREEN 2        YES  GREEN TEAM            CARDIO              375     480       0       0       0       0
PCMMPATIENT, TWO      HBPC PROVIDER 2     YES  HOME BASED PC TEAM    CARDIO                5       3       0       2       0       0
PCMMPATIENT, THREE    PROV BLUE 1         YES  BLUE TEAM CHANGED     OSTEOPATHIC         600     493       1     106       0       0
PCMMPATIENT, THREE    HBPC PROVIDER 1     YES  HOME BASED PC TEAM    OSTEOPATHIC           5       2       0       3       0       0

-----------------------------------------------------------------------------------------------------------------------------------
NOTE: This report reflects a count of all unique patients assigned to Primary Care and non-Primary Care within the date range
      selected.  If a date range larger than one day has been selected, the total patients assigned to a provider may be greater
      than the maximum defined for the position.  However, this does not imply that the provider had more than their maximum
      number of patients on any single date.
-----------------------------------------------------------------------------------------------------------------------------------
```

PCMM Inconsistency Report

```
            <Detailed by Patient>
                           PCMM INCONSISTENCY REPORT
                               May 02, 2006@08:11
===============================================================================
Teams: All teams
===============================================================================
POSITION INCONSISTENCIES
------------------------
   INCONSISTENCY
      TEAM                            POSITION
   Position has no staff assigned
      GRAY TEAM                       PROV GRAY1
      SIDNEY TEAM                     SIDNEY PROV1
      SWO TEST TEAM 1                 DOCTOR 1

PATIENT INCONSISTENCIES
-----------------------
   PATIENT                               SSN
      INCONSISTENCY
         TEAM                            POSITION

   PCMMPATIENT, NINE                     666982232
      Position assignment with inactive Team Assignment
         SWO TEST TEAM 1                 NURSE 1
  PCMMPATIENT, TWELVE                    666011265P
      Position assignment with inactive Team
         BLUE TEAM BRAVO                 PROV BLUE B1
```

FTEE and Panel Size Report

FTEE AND PANEL SIZE MAR 8,2012 15:02 PAGE 1

Provider's Name	Team	Team Position	AP or PCP	Associated Clinic	FTEE	Patients for Position Actual/ Active	Patients for Position Allowed/ Maximum	Available Patient Openings	Adjusted Panel Size
PCMMPROVIDER, ONE	AUTO TEAM	MEMBER2	PCP	CECELIA'S CARDI		0	0	0	0
PCMMPROVIDER, TWO	AUTO TEAM	MEMBER1	PCP			1	0	(1)	0
PCMMPROVIDER, THREE	BLUE	BLUE PHYSICIAN	PCP			0	0	0	0
PCMMPROVIDER, FOUR	BLUE	PHYS1	PCP		1.00	1	0	(1)	1
PCMMPROVIDER, FIVE	BRAD TEST	BLUE2	PCP			0	40	40	0
PCMMPROVIDER, SIX	BRAD TEST	BLUE	PCP			0	40	40	0
PCMMPROVIDER, SEVEN	NEW FTEE RULES	NEW PRECEPTOR	PCP		0.30	0	100	100	0
DICKENSON, EMILY	NEW FTEE RULES	NEW RESIDENT				0	0	0	0
PCMMPROVIDER, EIGHT	RJV TEST	RJV INTERN	PCP			0	25	25	0
COLLINS, WILKIE	RJV TEST TEAM	MEMBER1				0	0	0	0
BRONTE, CHARLOTTE	RJV TEST TEAM	MEMBER2				0	0	0	0
BRONTE, EMILY	ROB	DOC PRECEPTOR			0.60	2	99	97	3
PCMMPROVIDER, NINE	ROB	DOC 1	PCP	REW TEST NEW		3	1	(2)	0
PCMMPROVIDER, TEN	ROB	DOC RESIDENT	PCP	MIKE'S MURKY MA		1	66	65	0
DICKENS, CHARLES	ROB	DOC INACTIVATE				0	77	77	0
WOOLF, VIRGINIA	ROB	SOCIAL TESTED				0	20	20	0
PCMMPROVIDER, ELEVEN	ROSS TEST	ROSS PROVIDER 1	PCP		1.00	0	100	100	0
PCMMPROVIDER, TWELVE	STEVES Y2K	DOCTOR	PCP	STEVE'S CLINIC		0	20	20	0
PCMMPROVIDER, THIRTEEN	TEST 1	STAFF PHYSICIAN 1	PCP			0	0	0	0
PCMMPROVIDER, FOURTEEN	TESTING NEW TEAM	TESTING NEW TEAM	PCP			0	1	1	0
SPURGEON, DR	TH TEST	PHYSICIAN 1			1.00	0	100	100	0
LAMB, CHARLES	CECELIA'S TEAM	PRIMARY CARE			0.50	0	2	2	0
PCMMPROVIDER, FIFTEEN	GREEN	PROVIDER2	PCP		0.90	1	3	2	1
TOTAL					5.30	9	694	689	

REPORT KEY

Column Heading	Explanation of column heading.
Provider's Name	The name of the Provider.
TEAM	The name of the team to which this position (and therefore provider) is assigned.
Team Position	The name of the team position to which this provider is assigned.
AP or PCP	This column displays whether this provider is an Associate Primary Care Provider (AP) or a Primary Care Provider (PCP).
Associated Clinic(s)	The scheduling clinic(s) associated with this position/provider in the PCMM software.
FTEE	The number of hours the provider spends providing care expressed as a Full-Time Employee Equivalent Examples: One FTEE=1.00=40 hours per week. 0.75 FTEE=30 hours per week. 0.50 FTEE=20 hours per week. Percent FTEE is equal to 100 x the FTEE number on this report. For example FTEE=0.75= 75%.
Patients for Position Allowed	This represents the total maximum number of patients this provider is expected to care for on this panel. This number is entered in the PCMM GUI 'Primary Care Team Position Setup' window on the 'Settings' tab. Additional patients above this number may be assigned to the provider depending on local management policy.
Patients for Position Actual	The actual current number of active patients assigned to this provider in PCMM at the time of this report. This number displays on the PCMM GUI 'Primary Care Team Position Setup' window on the 'Settings' tab different FTEE values. Example, Active patients 500/0.85 FTEE=588. This is the number of patients this provider would be expected to provide primary care for if their FTEE=1.0.
FTEE and Panel Size Total	The total number of FTEE, patients for positions allowed, patients for positions actual, and available patient opening for this report. If this report is sorted on Associated Clinic, then subtotals for each clinic and a total for the entire report print. If this report is sorted on Team, then subtotals for each team and a total for the entire report print.

Staff Sched for Inactivation

```
WARNING- THE FOLLOWING PRIMARY CARE STAFF ARE SCHEDULED FOR AUTOMATED INACTIVATION FROM PCMM SOFTWARE UNLESS APPROPRIATE
AND CONSISTENT ENTRIES ARE ENTERED IN THE NEW PERSON FILE AND THE TEAM POSITION FILE IN ACCORDANCE WITH PRIMARY CARE AND
PCMM BUSINESS RULES IN VHA DIRECTIVE 2003-022.  (NOTE:  The staff's 'Person Class' is in the 'New Person' file, File #200,
sub-file 8932.1 and field .01.  The staff person's 'Role' is entered in the PCMM GUI, in the 'Primary Care Position Setup'
window on the 'Settings' tab.  'Role' is saved in the 'Team Position' file 404.57, 'Standard Role Name' field .03).
Following entry of correct and consistent file entries, staff will be removed from this report the next time the staff
inactivation routine runs, which is the last day of each month.

These are the Primary Care and PCMM business rules:

1.)  Primary care providers and staff designated as Primary Care Providers (PCPs) in PCMM, that are not a Primary Care
physician (Medical Doctor or Doctor of Osteopathy) Nurse Practitioner (NP) or Physician Assistant (PA) will be
inactivated in the PCMM software.
2.) Primary care providers and staff designated as Associate Primary Care Providers (APs,) that are not a Primary Care
Resident/Intern (Physician,) Nurse Practitioner (NP,) or Physician Assistant (PA,) will be inactivated in the PCMM software.
3.) All staff, which are designated as a Primary Care Provider (PCP) or an Associate Primary Care Provider (AP) who do not
have an appropriate 'Person Class' entry consistent with their 'Standard Role Name' in VistA Fileman, will be
inactivated from their primary care position in PCMM software.
4.) Staff inactivation's will occur six months after installation of this patch, SD*5.3*297.

Please contact the PCMM Coordinator or Information Systems (IRMS) department for assistance in resolving any problems.
```

```
Primary Care Staff Scheduled for Inactivation                                                 MAY  1,2006  17:13    PAGE 1
                                                                                           Sched.
                                      Assoc.                                        # Of  Inact.
Name                 Team Position    Clinic(s)        Role             Person Class     Pts.  Date      Inconsistency Reason
------------------------------------------------------------------------------------------------------------------------------------

           INSTITUTION: CHEYENNE VAMC
              TEAM: GRAY TEAM
PCMMPROVIDER.TEN     PROV GRAY1      EVENING PRIMARY  PHYSICIAN-PRIMA  Allopathic and   55    08/31/06
              TEAM: HOME BASED PC TEAM
PCMMPROVIDER.TEN     PROVIDER 1       EVENING PRIMARY  PHYSICIAN-PRIMA  Allopathic and   24    08/31/06  PersonClass not valid
PCMMPROVIDER.ONE     NUTRITION        DIETITIAN        Dietary and Nut                   24    08/31/06  Role not=PCprovider
                     ---------------                                                    ----  --------
TOTAL                                                                                   103   24
COUNT                3                                                                        3
MEAN                                                                                          8.00
MINIMUM                                                                                       08/31/06
MAXIMUM                                                                                       08/31/06
```

Institution	Institution name, previously called Division, in which provider sees primary care patients.
PC Team	Staff person's Primary Care team in PCMM software.
Name	Name of staff inactivated from their primary care position in PCMM software.
Team Position	The name of the team position to which the staff was assigned.
Associated Clinic	Associated Clinic(s) where provider saw primary care patients. 'Associated Clinics' display in the PCMM GUI, 'Primary Care Position Setup' window, on the 'Associated Clinics' tab and are saved in the Team Position file 404.575 and .01 field, 'Associated Clinics'.
Role	The function this position serves, as entered in PCMM GUI on the 'Primary Care Position Setup' window, 'General' tab and saved in the Team Position file 404.57, Standard Role Name field .03. Examples: Physician, Nurse Practitioner, Resident, Intern, Social Worker, or Psychologist.
Person Class	Nationally used clinician identifier for provider types from the New Person file #200, sub-file 8932.1, and field .01, for example, Physicians (MD and DO).
# Pts Assigned	The number of primary care patients currently assigned to this provider's position. This number, 'Patients for Position: Actual', displays in the PCMM GUI 'Primary Care Position Setup' window on the 'Settings' tab and is a count of the number of patients assigned to this provider position at the time of this report.
Scheduled Inactivate Date	Date staff will be inactivated from their Primary Care position in the PCMM software, if the staff's 'Role' and 'Person Class' aren't appropriate and consistent with Primary Care business rules.
Reason for Inconsistency/ Inactivation	The reason causing this primary care staff or provider's inactivation. Their 'Role' and 'Person Class' must be consistent and appropriate for their assignment in
Column	Explanation
	PCMM. Please refer to the Warning at the top of this report. 'Role not=PC provider' means the 'Standard Role Name' entered in file 404.57, .03 is not a valid role for this position to be a primary care provider. For example, Social Workers, Dietitians, Psychologists and others may not be indicated as providing primary care or be AP's or PCP's in PCMM according to the Primary Care business rules in VHA Directives. 'Person Class not valid' means this person's entry in the New Person file #200 is not congruent with being the type of primary care provider entered in PCMM. For example, a Resident may not be a PCP in PCMM.
Total	Sums the number of patients who will be or were effected by practitioners inactivation's from PCMM.
Count	A total count of the number of staff positions scheduled for inactivation or were inactivated.

Staff Inactivated Report

```
WARNING- THE FOLLOWING PRIMARY CARE STAFF ARE SCHEDULED FOR AUTOMATED INACTIVATION FROM PCMM SOFTWARE UNLESS APPROPRIATE
AND CONSISTENT ENTRIES ARE ENTERED IN THE NEW PERSON FILE AND THE TEAM POSITION FILE IN ACCORDANCE WITH PRIMARY CARE AND
PCMM BUSINESS RULES IN VHA DIRECTIVE 2003-022.  (NOTE:  The staff's 'Person Class' is in the 'New Person' file, File #200,
sub-file 8932.1 and field .01.  The staff person's 'Role' is entered in the PCMM GUI, in the 'Primary Care Position Setup'
window on the 'Settings' tab.  'Role' is saved in the 'Team Position' file 404.57, 'Standard Role Name' field .03).
Following entry of correct and consistent file entries, staff will be removed from this report the next time the staff
inactivation routine runs, which is the last day of each month.

These are the Primary Care and PCMM business rules:

1.)  Primary care providers and staff designated as Primary Care Providers (PCPs) in PCMM, that are not a Primary Care
physician (Medical Doctor or Doctor of Osteopathy) Nurse Practitioner (NP) or Physician Assistant (PA) will be
inactivated in the PCMM software.
2.) Primary care providers and staff designated as Associate Primary Care Providers (APs,) that are not a Primary Care
Resident/Intern (Physician,) Nurse Practitioner (NP,) or Physician Assistant (PA,) will be inactivated in the PCMM software.
3.) All staff, which are designated as a Primary Care Provider (PCP) or an Associate Primary Care Provider (AP) who do not
have an appropriate 'Person Class' entry consistent with their 'Standard Role Name' in VistA Fileman, will be
inactivated from their primary care position in PCMM software.
4.) Staff inactivation's will occur six months after installation of this patch, SD*5.3*297.

Please contact the PCMM Coordinator or Information Systems (IRMS) department for assistance in resolving any problems.

Primary Care Staff Scheduled for Inactivation                                          APR  5,2006  15:28    PAGE 1
                                                                                    Sched.
                                 Assoc.                                      # Of  Inact.
Name                 Team Position    Clinic(s)        Role            Person Class     Pts.  Date      Inconsistency Reason
-------------------------------------------------------------------------------------------------------------------------------

                                                  *** NO RECORDS TO PRINT ***
```

Individual Team Profile

Printed on: 4/5/2006 Individual Team Profile Page: 1

Team Description:

Blue Primary Care Team Bravo

Team Position	Provider Name	Standard Role	PC?	Patients Allowed	Patients Assigned	Associated Clinic
PROV BLUE B1	PCMMPROVIDER, TEN	PHYSICIAN-PRIMARY CARE	NPC	0	0	CARDIO
PROV BLUE B2	PCMMPROVIDER, FIVE	NURSE PRACTITIONER	NPC	0	0	
PROV BLUE B3	PCMMPROVIDER, THREE	PHYSICIAN-PRIMARY CARE	NPC	0	0	OSTEO

Team Member Listing

```
Printed on: 4/5/2006                                  Team Member Listing                                   Page: 1

Division: CHEYENNE VAMC
Team Name: BLUE TEAM BRAVO             Team Phone: 778-7555
Primary Care Team: YES

Members:

PCMMPATIENT, ELEVEN                      Position: PROV BLUE B2
Standard Role: NURSE PRACTITIONER
User Class:
MEDICAL SERVICE - PROVIDER        Assoc Clinic:
Office Phone: 8877                Room:
Begin Date: 11/01/1998            End Date:
Person Class: Physician Assistants and Advanced Practice Nursing Providers
                 Nurse Practitioner
                    Family

Printed on: 4/5/2006                                  Team Member Listing                                   Page: 2

Division: CHEYENNE VAMC
Team Name: BLUE TEAM BRAVO             Team Phone: 778-7555
Primary Care Team: YES

Members:

PCMMPATIENT, TWELVE                   Position: PROV BLUE B1
Standard Role: PHYSICIAN-PRIMARY CARE
User Class:
MEDICAL SERVICE                   Assoc Clinic: OSTEO PC
Office Phone: 8787               Room:
Begin Date: 11/01/1998           End Date:
Person Class: Allopathic and Osteopathic Physicians
                 Family Practice
```

Team Patient Listing

Printed on: 5/1/2006 Team Patient Listing Page: 1

Division: CHEYENNE VAMC

Team: BLUE TEAM Team Phone: 778-7555
Primary Care Team: YES

Team Description:

Blue Primary Care Team

[Not Assigned] = Patient assigned to Team but not to a position/provider
[Inactive Position] = Patient assigned to Team & Position but has no active provider

Patient Name	Pt ID	Practitioner	Role	PC?	Last Appt.	Next Appt.	Associated Clinic
PCMMPATIENT, ONE	5938	PCMMPROVIDER, SIX	NURSE PRACTITIONER	PCP	09/07/2005		CARDIO
PCMMPATIENT, SEVEN	6027	PCMMPROVIDER, SIX	NURSE PRACTITIONER	PCP	02/02/2006		OSTEO
PCMMPATIENT, TWO	9680	PCMMPROVIDER, TEN	PHYSICIAN-PRIMARY CARE	PCP	12/29/2005		CARDIO
PCMMPATIENT, EIGHT	0101	PCMMPROVIDER, EIGHT	NURSE PRACTITIONER	PCP	06/08/2005	06/02/2006	OSTEO
PCMMPATIENT, TWELVE	7449	[Inactive Position]	PHYSICIAN-PRIMARY CARE	PCP			EVENING PRIMARY CARE
PCMMPATIENT, THREE	6774	[Not Assigned]					

Summary Listing of Teams

```
Division: CHEYENNE VAMC

Team Name: BLUE TEAM
                                                                                          Max.  --Assigned--  --Precepted-
                                                                                          Pts.  --Patients--  --Patients--
Practitioner          Position              PC?  Standard Role         Associated Clinic          Allow.  PC      NonPC  PC      NonPC
==========================================================================================================================

Printed on: 5/1/2006                              Summary Listing of Teams                                          Page: 1

PCMMPROVIDER, ONE     NURSE BLUE 6          NPC  NURSE (RN)                                          0       0       0      0       0
PCMMPROVIDER, TWO     PROV BLUE 2           PCP  NURSE PRACTITIONER    CARDIO                      522     540       0      0       0
PCMMPROVIDER, THREE   PROV BLUE 1           PCP  PHYSICIAN-PRIMARY CA  CARDIO                      600     491       1      0       0
PCMMPROVIDER, FOUR    NURSE BLUE 1          NPC  NURSE (RN)                                          0       0       0      0       0
```

Historical Patient Assignment Detail

```
--------------------------------------------------------------------------------
                 <*>  HISTORICAL PATIENT ASSIGNMENT DETAIL  <*>
               For assignments effective OCT 7,2008 to OCT 7,2008
--------------------------------------------------------------------------------
Date printed: OCT 7,2008@14:22                                          Page: 1
--------------------------------------------------------------------------------
Patient: PCMMPATIENT, SIX  SSN: 666014621   DOB: JUL 21,1954  AGE: 54   FEMALE
--------------------------------------------------------------------------------
Assignment                  Active      Inactive    Assigned by/date
--------------------------  ----------  ----------  ----------------------------
PC Provider:
PCMMPROVIDER, ONE           10/05/2004              PCMMUSER, ONE (10/05/2004)

PC Associate Provider:  (none found)

PC Position:
PROV GREEN 6                10/05/2004              PCMMUSER, ONE (10/05/2004)
User Entering:
Last Edited By:
Status:

PC Preceptor Position:  (none found)
```

Historical Provider Position Assignment Listing

```
                          <*>  HISTORICAL PROVIDER POSITION ASSIGNMENT LISTING  <*>
                    Detail for Provider Position Assignments Effective: APR 2,2006 to MAY 2,2006
-------------------------------------------------------------------------------------------------------
Date printed: MAY 2,2006@08:24                                                                  Page: 1
-------------------------------------------------------------------------------------------------------
                                                                         Max.  ---Assigned---         ---Precepted--
                                                                         Pts.  ---Patients---   Open  ---Patients---
Provider Name      Position          PC?  Team                Associated Clinic Allow.  PC    Non-PC  Slots  PC    Non-PC
------------------ ----------------- ---  ------------------- ----------------- ------ ------ ------ ------ ------ ------
PCMMPROVIDER, TEN  HBPC PROVIDER 15  YES  HOME BASED PC TEAM                        5      0      0      5      0      0
PCMMPROVIDER, SIX  SW GREEN 1        NO   GREEN TEAM                                0      0      0      0      0      0
PCMMPROVIDER, TWO  SW GREEN B1       NO   GREEN TEAM BRAVO                          0      0      0      0      0      0
PCMMPROVIDER, NINE PROV FC2          YES  FORT COLLINS TEAM   FT COLLINS BEEDE    837    815      0     22      0      0
PCMMPROVIDER, ONE  NURSE 1           NO   SWO TEST TEAM 1                          12      0      2     10      0      0

-------------------------------------------------------------------------------------------------------
NOTE: This report reflects a count of all unique patients assigned to Primary Care and non-Primary Care within the date range
      selected.  If a date range larger than one day has been selected, the total patients assigned to a provider may be greater
      than the maximum defined for the position.  However, this does not imply that the provider had more than their maximum
      number of patients on any single date.
-------------------------------------------------------------------------------------------------------
```

Historical Patient Position Assignment Listing

```
---------------------------------------------------------------------------------------------------------------------------------------
                                              <*>  HISTORICAL PATIENT POSITION ASSIGNMENT LISTING  <*>
                                   Detail for Patient Position Assignments Effective: APR 2,2006 to MAY 2,2006
---------------------------------------------------------------------------------------------------------------------------------------
Date printed: MAY 2,2006@08:38                                                                                                 Page: 1
---------------------------------------------------------------------------------------------------------------------------------------
                    Pat.    Primary     MT                                                            Enrolled
Patient Name        Id.     Elig.       Cat  Team           Provider         Team Position    PC?  Clinic           Act. Date   Inac. Date
------------------  -----   ---------   ---  ------------   --------------   --------------   ---  --------------   ----------  ----------
PCMMPATIENT, NINE   9570    SC < 50          GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998
PCMMPATIENT, TEN    7452    SC 50-100        GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998
PCMMPATIENT, TWO    7591    NSC          A   GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998
PCMMPATIENT, EIGHT  7437    NSC          A   GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998
PCMMPATIENT, SEVEN  5888    SC < 50          GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998
PCMMPATIENT, THREE  8769    SC 50-100        GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998
PCMMPATIENT, ONE    2625    SC 50-100        GREEN TEAM     PCMMPROV, SIX    PROV GREEN 1     PCP  OSTEO PC         11/01/1998

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NOTE: More than one provider may be associated with a single patient position assignment.  This output returns a separate output
      line for each related provider during the date range selected.

      'PC?' represents provider type:  AP = Associate provider, PCP = Primary Care Provider, NPC = Non-Primary Care Provider.
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Historical Team Assignment Summary

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                                            <*>  HISTORICAL TEAM ASSIGNMENT SUMMARY  <*>
                         Summary of Team and Team Position Assignments Effective: APR 2,2006 to MAY 2,2006
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Date printed: MAY 2,2006@08:44                                                                                               Page: 1
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                                                                Team  --Team Position-  --Team Position-    Total           Pts w/o  Pts w/o
Division                                   Max.     Team     Assign.  ---Assignments--  ---Unique Pts.--   Unique    Open     Pos.     Team
  Team                             PC?     Pts.   Assign.   Uniques   PC        Non-PC  PC        Non-PC     Pts.   Slots   Assign.  Assign.
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CHEYENNE VAMC                      YES     9317      9284      9236     8932         7     8928         6     9237     1034      350        1
  BLUE TEAM BRAVO                  YES        0         2         2        0         1        0         1        2        0        1        0
  BLUE TEAM CHANGED                YES     3300      3730      3730     3668         2     3668         2     3730        0       62        0
  CHEYENNE PC UNASSIGNED           NO         0         0         0        0         0        0         0        0        0        0        0
  GREEN TEAM                       YES        1         0         0        0         0        0         0        0        1        0        0
  FORT COLLINS TEAM                YES     1916      2241      2241     2171         0     2170         0     2241        0       71        0

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NOTE: This report represents a count of team and team position assignments within the date range selected.  If a date range
      larger than one day has been selected, the total unique patients and assignments may be greater than the maximum defined
      for the team, reducing the open slots reflected by this report accordingly.  However, this does not imply that the team
      had more than its maximum number of patients on any single date.
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