Scheduling V. 5.3

Primary Care Management Module (PCMM)

Installation Guide/Release Notes

Patch SD*5.3*177

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Department of Veterans Affairs
VIST**A** Technical Services

Table of Contents

Installation Guide

I. Introduction

This manual provides details on the preparation for and installation of Patch SD*5.3*177 to the PCMM software. It includes instructions on the installation of both the Client software and the Server software.

If PCMM has not been installed at your site, you must start with Scheduling Patch SD*5.3*41 and load all subsequent patches prior to loading SD*5.3*177. Patch SD*5.3*177 is not a virgin install patch.

This patch provides updates to the Scheduling and Registration software. There are no changes to any other **V***IST***A** applications.

II. Pre Installation

Server

The following package versions (or higher) must be installed prior to loading the PCMM software. Since this patch is to existing PIMS software, all preceding PIMS patches should be installed.

Application Name	Minimum Version or Patch	Checked for in Build SD*5.3*177
PIMS	SD*5.3*148	YES
PIMS	SD*5.3*157	YES
PIMS	SD*5.3*169	YES
PIMS	SD*5.3*41	YES
PIMS	SD*5.3*144	YES
PIMS	SD*5.3*149	YES
PIMS	SD*5.3*171	YES
PIMS	SD*5.3*195	YES
MailMan	XMB*999*125	YES
FileMan	FM*22.0	YES

HL7 Incoming and Outgoing Filers
The PCMM software uses HL7 messages to communicate with the National Patient Care Database (NPCDB). In order for the HL7 messages to be transmitted, at least one HL7 incoming filer and one HL7 outgoing filer must be running. The option Monitor incoming & outgoing filers [HL FILER MONITOR] should be used to verify that the HL7 incoming and outgoing filers are running. Information about this option and the HL7 incoming and outgoing filers can be obtained from the **V***IST***A** HL7 V. 1.6 User Manual.

Client

The workstation must have one of the following operating systems.

- MS Windows 95B or higher
- MS Windows NT Workstation V. 3.51

Each workstation should be networked into your **V***IST***A** Server through a local area network. The RPC Broker's RPC Broker Test should have successfully run on each client workstation.

III. Installation Activities

Server

Installation of the server build will affect the running of ALL previous client versions of PCMM. All previous client versions of PCMM should not function.

Several changes in this patch effect Scheduling and Registration routines. As a result it is highly recommended that this patch be loaded after hours when there are no Scheduling or Registration users on the system. The installation of the server software takes less than 5 minutes.

A. Installation Steps

1. The KIDs build is distributed in a host file, SD_53_177.KID, which must be obtained from an appropriate CIOFO FTP site. When transporting the KIDS file from the FTP site, be sure to set the type as ASCII.

2. Place the host file into a directory that is accessible from the account into which you are installing.

3. Review your mapped set. If any of the routines listed in the Routine Summary section of this guide are mapped, they should be removed from the mapped set at this time.

4. From the Kernel Installation and Distribution System menu, select the Installation Menu.

5. Select LOAD A DISTRIBUTION. When prompted for a host file name, enter SD_53_177.KID. This will load the distribution onto your system.

6. You may now elect to use the following options (when prompted for INSTALL NAME, enter SD*5.3*177).

  a. Backup a Transport Global – This option will create a backup message of any routines exported with the patch. It will NOT backup any changes such as DDs or templates.

  b. Compare Transport Global to Current System – This option will allow you to view all changes that will be made when the patch is installed. It compares all components of the patch (routines, DDs, templates, etc.).

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

7. Use the Install Package(s) option and select package SD*5.3*177.

8. This build will bring in two new mail groups, PCMM AUSTIN REPORTS and PCMM HL7 MESSAGES. You will be asked for a coordinator. Enter the name of the person responsible for PCMM.

9. The install will ask if you wish to rebuild menu trees. It is recommended that you answer NO to this prompt. The trees will be rebuilt next time the system does this task.

10. When prompted "Want KIDS to INHIBIT LOGONs during the install? YES//", it is recommended you answer NO. The disabling of the Scheduling and Registration options will protect the installation.

11. When prompted to select the options you would like to place out of order, enter the following.

SDAPP	Appointment Menu
SDMGR	Scheduling Manager's Menu
SDNEXT	Find next Available Appointment
SDOUTPUT	Outputs
SDSUP	Supervisor Menu
SDM	Make Appointment
SDAM APPT MGT	Appointment Management
SDPATIENT	Patient Profile MAS
SC PCMM GUI WORKSTATION	PCMM GUI Workstation
SC PCMM PT LIST W/TEAM ASSIGN	Patient Listing for Team Assignments
SC PCMM PRACT PATIENTS	Practitioner's Patients
SC PCMM REPORTS MENU	PCMM Reports
DG LOAD PATIENT DATA	Load/Edit Patient Data

12. If routines were unmapped as part of Step 2, they should be returned to the mapped set once the installation has run to completion. Consider mapping the following routines: SCAP* SCUTBK* SCMCT*.

13. Ensure the AutoStart field (#4.5) in the HL LOGICAL LINK file (#870) for entry PCMM is set to ENABLED.

14. Schedule PCMM's HL7 transmission builder.

   a. From the TaskMan Management Menu, select the *Schedule/Unschedule Options* option.
   b. At the "Select OPTION to schedule or reschedule: " prompt, enter *SCMC PCMM HL7 TRANSMIT*.
   c. At the "Are you adding SCMC PCMM HL7 TRANSMIT as a new OPTION SCHEDULING ? " prompt, enter *YES*.
   d. In the ScreenMan form, enter *T+1@01:00* into the QUEUED TO RUN AT WHAT TIME field and *1D* into the RESCHEDULING FREQUENCY field.
   e. Save changes and exit the form.

15. Start PCMM's HL7 Lower Level Protocol (LLP).

   a. From the HL7 Main Menu, select the *V1.6 OPTIONS* menu.
   b. From this menu, select the *Communications Server* menu.
   c. From this menu, select the *Start LLP* option.
   d. At the "Select HL LOGICAL LINK NODE: " prompt, enter *PCMM*.
   e. Accept the default response at the "Method for running the receiver: B// " prompt.

B. Server Installation Notes

Installation of the new HL7 Protocol will cause the following verbiage to appear during the install. "Not a known package or a local namespace." This is because these are new protocols. Everything will be installed ok.

Sites that have not yet installed XU*8.0*124 will see the following error message in the KIDS dialog relating to the import of data into Files 403.43 and 403.44. This error message is extraneous and does not impact the build. Installation of XU*8.0*124 is recommended but not necessary.

"**ERROR IN DATA DICTIONARY FOR FILE # XXX.XX**"

The KIDS build will import changes to the List Template SDAM APPT MGT. This will overwrite any modifications your site may have made.

C. Sample of Server Installation

```
Select Installation Option: 6  Install Package(s)
Select INSTALL NAME: SD*5.3*177      Loaded from Distribution
9/9/99@12:59:36
    => PCMM BUILD  ;Created on Sep 08, 1999@13:56:40
```

This Distribution was loaded on Sep 09, 1999@12:59:36 with header of
    PCMM BUILD ;Created on Sep 08, 1999@13:56:40
    It consisted of the following Install(s):
      SD*5.3*177   DG*5.3*239
Checking Install for Package SD*5.3*177
Will first run the Environment Check Routine, SD53P177

Install Questions for SD*5.3*177

Incoming Files:

   403.43   SCHEDULING EVENT (including data)
Note: You already have the 'SCHEDULING EVENT' File.
I will OVERWRITE your data with mine.

   403.44   SCHEDULING REASON (including data)
Note: You already have the 'SCHEDULING REASON' File.
I will OVERWRITE your data with mine.

   404.41   OUTPATIENT PROFILE (Partial Definition)
Note: You already have the 'OUTPATIENT PROFILE' File.

   404.43   PATIENT TEAM POSITION ASSIGNMENT
Note: You already have the 'PATIENT TEAM POSITION ASSIGNMENT' File.

   404.44   PCMM PARAMETER (including data)
Note: You already have the 'PCMM PARAMETER' File.
I will OVERWRITE your data with mine.

   404.45   PCMM SERVER PATCH (including data)
Note: You already have the 'PCMM SERVER PATCH' File.
I will OVERWRITE your data with mine.

   404.46   PCMM CLIENT PATCH (including data)
Note: You already have the 'PCMM CLIENT PATCH' File.
I will OVERWRITE your data with mine.

   404.48   PCMM HL7 EVENT
Note: You already have the 'PCMM HL7 EVENT' File.

   404.49   PCMM HL7 ID
Note: You already have the 'PCMM HL7 ID' File.

   404.52   POSITION ASSIGNMENT HISTORY (Partial Definition)
Note: You already have the 'POSITION ASSIGNMENT HISTORY' File.

    404.53   PRECEPTOR ASSIGNMENT HISTORY
Note: You already have the 'PRECEPTOR ASSIGNMENT HISTORY' File.

    404.57   TEAM POSITION
Note: You already have the 'TEAM POSITION' File.

    409.92   ACRP REPORT TEMPLATE PARAMETER (including data)
Note: You already have the 'ACRP REPORT TEMPLATE PARAMETER' File.
I will OVERWRITE your data with mine.

Incoming Mail Groups:

Enter the Coordinator for Mail Group 'PCMM AUSTIN REPORTS': SMITH, RICK
                 COMPUTER SPECIALIST

Enter the Coordinator for Mail Group 'PCMM HL7 MESSAGES': SMITH, RICK
                 COMPUTER SPECIALIST

Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// NO

Checking Install for Package DG*5.3*239

Install Questions for DG*5.3*239

Want KIDS to INHIBIT LOGONs during the install? YES// NO
Want to DISABLE Scheduled Options, Menu Options, and Protocols? YES//

Enter options you wish to mark as 'Out Of Order': SDAPP
Enter options you wish to mark as 'Out Of Order': SDMGR
Enter options you wish to mark as 'Out Of Order': SDNEXT
Enter options you wish to mark as 'Out Of Order': SDOUTPUT
Enter options you wish to mark as 'Out Of Order': SDSUP
Enter options you wish to mark as 'Out Of Order': SDM
Enter options you wish to mark as 'Out Of Order': SDAM APPT MGT
Enter options you wish to mark as 'Out Of Order': SDPATIENT
Enter options you wish to mark as 'Out Of Order': SC PCMM GUI WORKSTATION
Enter options you wish to mark as 'Out Of Order': SC PCMM PST W/TEAM ASSIGN
Enter options you wish to mark as 'Out Of Order': SC PCMM PRACT PATIENTS
Enter options you wish to mark as 'Out Of Order': SC PCMM REPORTS MENU
Enter options you wish to mark as 'Out Of Order': DG LOAD PATIENT DATA

Enter protocols you wish to mark as 'Out Of Order':

Delay Install (Minutes): (0-60): 0//

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

DEVICE: HOME//   UCX/TELNET

```
Install Started for SD*5.3*177 : Sep 09, 1999@13:03:32

Build Distribution Date: Sep 08, 1999

Installing Routines:  Sep 09, 1999@13:03:48

Running Pre-Install Routine: PRE^SD53P177

Deleting file #409.92 entries...

 Installing Data Dictionaries:

** ERROR IN DATA DICTIONARY FOR FILE # 403.43 **
Data Dictionary not installed; FIA node is set to "No DD Update"

** ERROR IN DATA DICTIONARY FOR FILE # 403.44 **
Data Dictionary not installed; FIA node is set to "No DD Update"
               Sep 09, 1999@13:04:03

 Installing Data: Sep 09, 1999@13:04:07

 Installing PACKAGE COMPONENTS:

 Installing MAIL GROUP

 Installing HL LOWER LEVEL PROTOCOL PARAMETER

 Installing HL LOGICAL LINK

 Installing HL7 APPLICATION PARAMETER

 Installing PROTOCOL

 Installing REMOTE PROCEDURE

 Installing LIST TEMPLATE

 Installing OPTION Sep 09, 1999@13:04:35

 Running Post-Install Routine:  POST^SD53P177

Move current preceptor assignments to Preceptor History file
Sep 09, 1999@13:04:35 (by: 0)
--------------------------------------------------------------
: Queued - Task# 141716

Reindexing of file 404.43 queued.
Generating mail message with PCMM Inconsistency Report totals.

Editing menu text values for GUI report selection...

Updating Routine file...

Updating KIDS files...

SD*5.3*177 Installed. Sep 09, 1999@13:04:45
```

```
                            DG*5.3*239
--------------------------------------------------------------------------------
Install Started for DG*5.3*239 :
               Sep 09, 1999@13:04:45

Build Distribution Date: Sep 08, 1999

Installing Routines: Sep 09, 1999@13:04:46

Updating Routine file...

Updating KIDS files...

DG*5.3*239 Installed. Sep 09, 1999@13:04:47

Install Completed
```

D. Routine Checksums

The following is a list of the routine(s) included in this patch. The second line of each of these routine(s) will look like:

```
        <tab>;;5.3;Scheduling;**[patch list]**;AUG 13, 1993
```

```
                        CHECK^XTSUMBLD results
    Routine name      Before Patch        After Patch          Patch List
    ============      ============        ===========          ==========
    SCAPMC               6857758             7956411             41,177
    SCAPMC21             5281594             5142284           41,148,177
    SCAPMC24             3741743             3977217           41,148,177
    SCAPMC25             4477025             5524623             41,177
    SCAPMC3              2653336             2770454             41,177
    SCAPMC33                 N/A             3527086               177
    SCAPMC34                 N/A             3511312               177
    SCAPMC8              4379039             5350655             41,177
    SCAPMC8A                 N/A             2365501               177
    SCAPMC8C                 N/A             4362775               177
    SCAPMC8P                 N/A             4281646               177
    SCAPMCA                  N/A             1947176               177
    SCAPMCA1                 N/A             6363899               177
    SCAPMCU1             6781359             8220234           41,45,48,177
    SCAPMCU2             7201711             8613214             41,177
    SCAPMCU3             3394109             4970759           41,45,177
    SCAPMCU5                 N/A             3360719               177
    SCMCBK               7408285             6802845       41,51,148,157,177
    SCMCBK5              2325438             2432956             148,177
    SCMCBK6              1555967             1832960             148,177
    SCMCBK7              3399449             3338017             148,177
    SCMCBK8              4278210             4560566             148,177
    SCMCCV3              6497864             6492408             195,177
    SCMCDD              12778341            12827432           41,51,177
    SCMCGU               1204651             1372019             195,177
    SCMCHL                   N/A             3499315               177
```

SCMCHLB	N/A	2682646	177
SCMCHLB1	N/A	3642671	177
SCMCHLB2	N/A	2546291	177
SCMCHLE	N/A	1655433	177
SCMCHLG	N/A	2380461	177
SCMCHLM	N/A	2193938	177
SCMCHLR	N/A	4489109	177
SCMCHLS	N/A	1380175	177
SCMCHLX	N/A	1291785	177
SCMCHLX1	N/A	2276272	177
SCMCHLZ	N/A	2120667	177
SCMCLK	N/A	6643624	177
SCMCMM	1318327	1545875	41,177
SCMCMU2	13709944	13709948	148,177
SCMCQK	6083157	6148118	148,177
SCMCQK1	12166811	12130808	148,177
SCMCTMM	9675406	9780103	41,45,87,100,130 177
SCMCTPU4	6696171	6605851	148,177
SCMCU1	819873	812453	41,177
SCMCUT	N/A	3869854	177
SCRPBK1	4907035	4999190	41,177
SCRPEC	4888747	4951439	41,140,174,177
SCRPEC2	6683293	7757888	41,140,174,177
SCRPEC3	4007435	5091953	41,48, 52,177
SCRPITP	4144858	4771270	41,52,177
SCRPITP2	5337807	6519044	41,177
SCRPMPSP	10947655	11004913	148,157,169,177
SCRPO	N/A	9013648	177
SCRPO1	N/A	15269249	177
SCRPO2	N/A	14407873	177
SCRPO3	N/A	14691019	177
SCRPO4	N/A	7296135	177
SCRPO5	N/A	7236817	177
SCRPO6	N/A	12525471	177
SCRPO7	N/A	11997428	177
SCRPPAT	6947612	10278931	41,52,177
SCRPPAT2	8172506	8798204	41,48,174,181,177
SCRPPAT3	7317322	8025045	41,52,148,174,181 177
SCRPRAC	3717903	2883175	41,52,177
SCRPRAC2	3626396	5994526	41,177
SCRPSLT	4875040	5540131	41,52,1 77
SCRPSLT2	4889295	7870988	41,174,177
SCRPTA	6873963	6144666	41,48,52,114,174 181,177
SCRPTA2	6451681	7729402	41,88,140,148,174 181,177
SCRPTM	6336968	7188793	41,48,52,181,177
SCRPTM2	5183085	6472376	41,140,1 77
SCRPTP	5920383	6478803	41,48,174,177
SCRPTP2	7016274	7531793	41,53,52,174,177
SCRPTP3	6390783	6767820	41,48,98,177
SCRPU3	5800911	5974611	41,45,52,140,181 177
SCRPU4	1228733	189028	41,177

SCRPV1	N/A	6104082	177
SCRPV1A	N/A	8820855	177
SCRPV1B	N/A	7490878	177
SCRPV1B1	N/A	12907171	177
SCRPW25	27373533	28714128	144,177
SCUTBK11	6362605	7036633	41,54,86,148,177
SCUTBK3	2029958	3151906	41,51,177
SD53P177	N/A	4464040	177
SDAL	7212199	7641091	37,46,106,171,177
SDAL0	14046778	14119646	28,37,106,149,171 177
SDAM	3465080	3995198	149,177
SDPPALL	6524499	5759518	6,41,177
SDPPTEM	6500287	8547137	41,177
SDUTL3	1449734	1664797	30,39,41,148,177

Client

The installation of the client software should take less than 5 minutes per workstation. The following steps must be taken for each PCMM workstation.

1. Download the SD_53_177.EXE file from an appropriate CIOFO FTP site.

    a. Make sure to set transfer as BINARY.
    b. Get the SD_53_177.EXE;1 file. Depending on the FTP software, this file might be placed in C:\WINDOWS, C:\, or some other directory. If you cannot find it, use Window's File Manager's Search functionality.
    c. VMS requires the ";1" extension on this file. It is necessary to rename the file to SD_53_177.EXE (without the ";1").

2. Copy the SD_53_177.EXE file into an empty (temporary or scratch) directory.

3. Run the SD_53_177.EXE file (double click on it). This starts the PCMM installation. See Section IV, Installation of the PCMM Client Software, for information on the files installed in the Client Workstation.

Client Installation Notes

A PCMM.EXE cannot be placed on a workstation and successfully executed if the full installation has never been run on the workstation. The full installation registers two DLLs that are needed for the .EXE to run. If the full client installation has been performed, then any subsequent .EXE can be placed on the PC and utilized. The installation will install the following files onto that workstation.
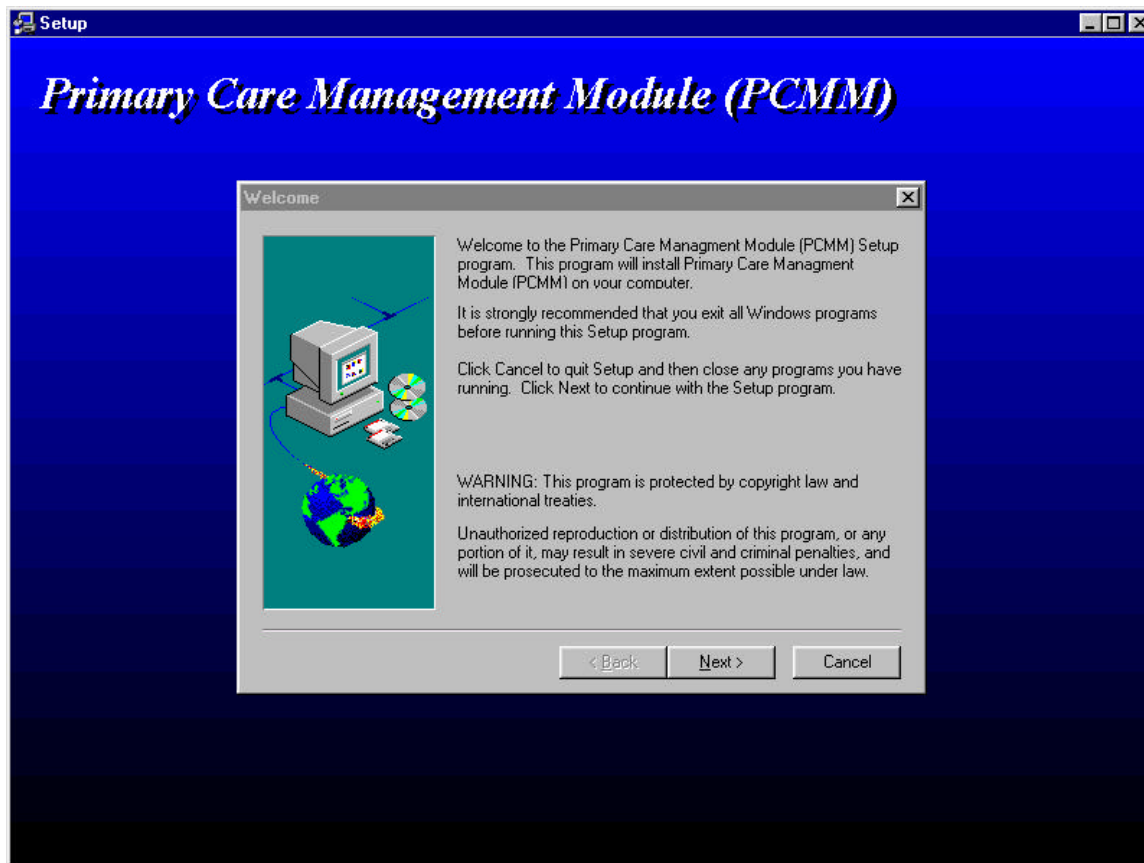
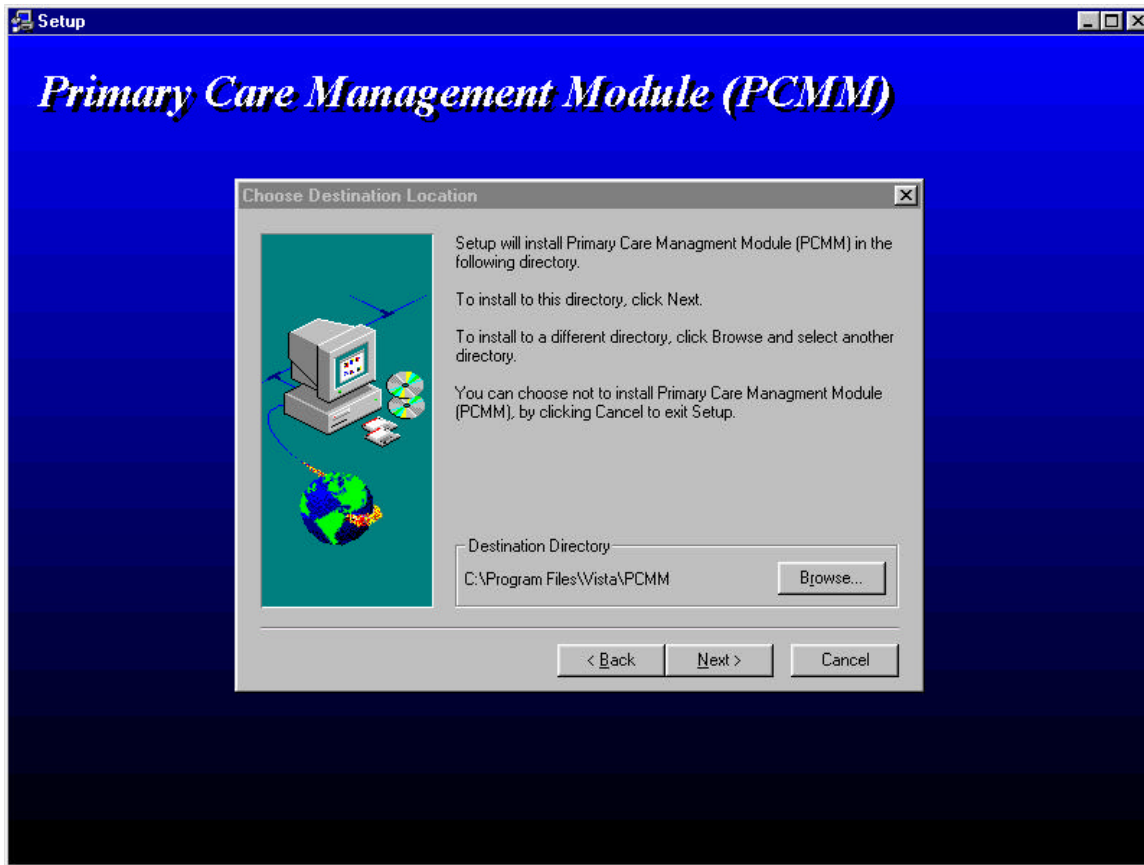|	
PCMM.EXE	1369 KB
PCMM.HLP	115 KB
RESIZER.DLL	559 KB
RESIZABLECONTROL.DLL	130 KB

IV. Installation of the PCMM Client Software

The following screens illustrate the installation of the PCMM client software. If all the default responses are accepted, the PCMM software will be installed into the appropriate **V***IST***A** directory on the user's workstation.
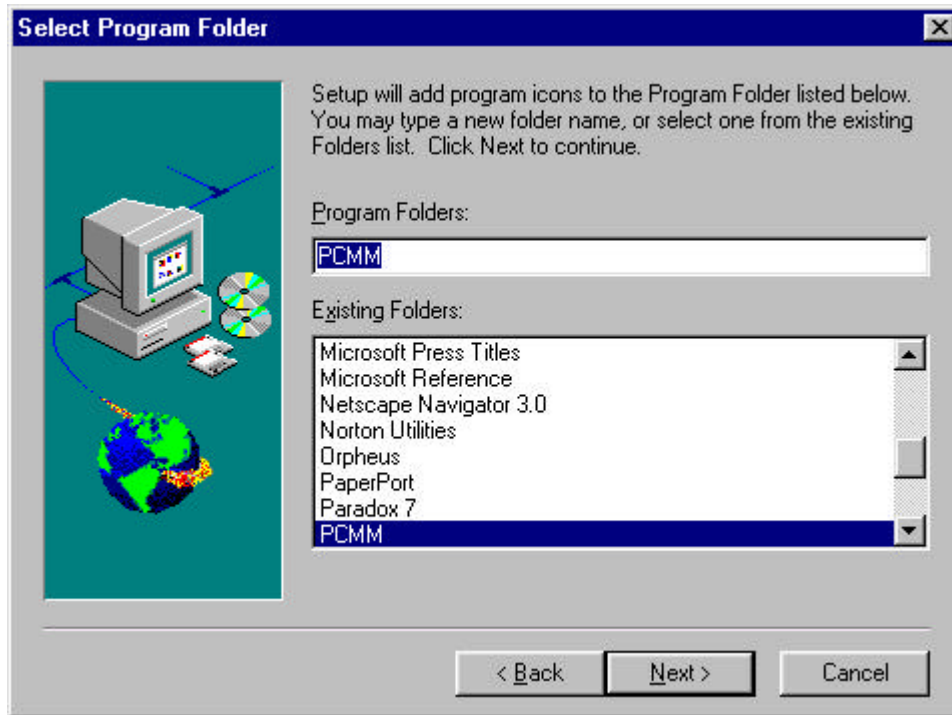
This version of the client software can be installed as either a patch to the existing client software or as a new installation.
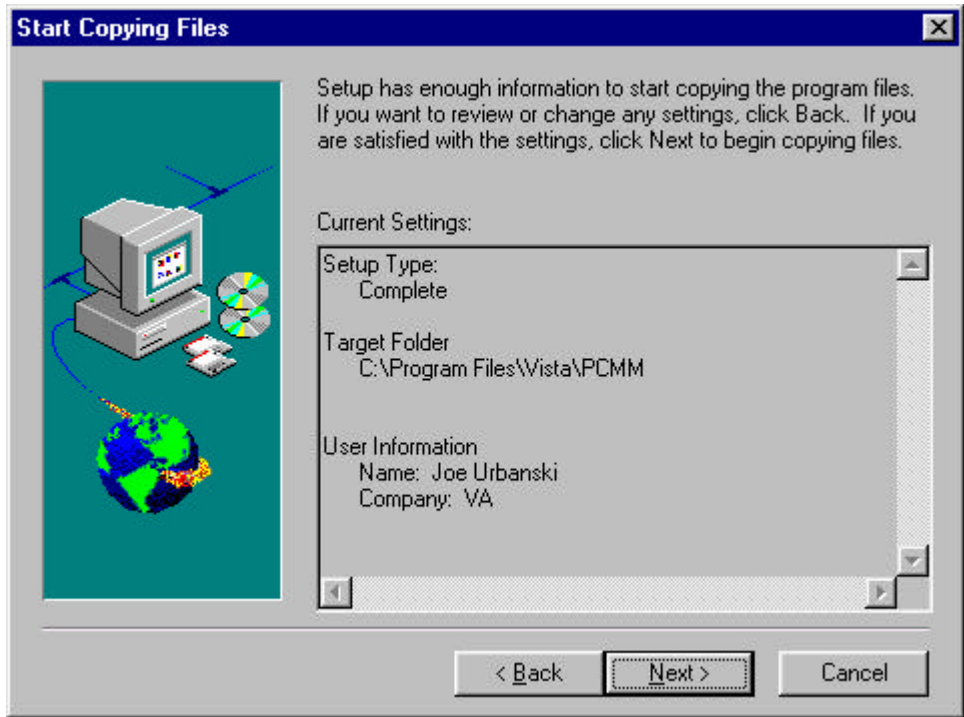

The first screen is a welcome or introduction screen. After reading and following the instructions, click on the NEXT button to continue.

The second screen displays the directory into which the software will be installed. This is the default directory used for **V**_IST_**A** software. It is recommended that you accept this directory.

Select Program Folder

Setup will add program icons to the Program Folder listed below. You may type a new folder name, or select one from the existing Folders list. Click Next to continue.

Program Folders:

PCMM

Existing Folders:

Microsoft Press Titles
Microsoft Reference
Netscape Navigator 3.0
Norton Utilities
Orpheus
PaperPort
Paradox 7
PCMM

< Back   Next >   Cancel

This next screen allows the installer to define the program icon that is created. Accepting the default is recommended.

This screen displays the type of installation, where the software is going to be placed, and who is performing the installation.

Upon selecting the NEXT button on this screen, Install Shield will install the PCMM software in the target folder and set up the program icon. It will also create/update a subfolder of PCMM\docs in which it stores all the documentation files in a .PDF format.

This is the last window in the installation. At this point, the software is installed. Install Shield asks the installer if they wish to run the application. There are no recommended responses at this point. If the YES box is checked, Install Shield will start PCMM. If it is not checked, Install Shield will finish and close.

Release Notes

USER RELEASE NOTES

This patch makes changes to the PCMM software, addressing some of the reported NOIS issues and adding new functionality. The changes and additions are defined below. If necessary, please refer to the PIMS User Manual - Scheduling Module regarding PCMM Reports, the PCMM User Guide, the Practice Profiling Software Requirements Specifications, or the online help for further information.

Several new enhancements have been made to the PCMM GUI software to comply with the Practice Profiling effort. This new functionality addresses the need to show a relationship between the *associate provider* (the provider that sees the patient on a day to day basis) and the *primary care provider* (the person that is ultimately responsible for the care of that patient). This relationship will be established through the preceptor functionality available in PCMM. As a result of this new linkage the following changes have been made.

I. GUI Side

A. PC Attending Assignments
PC attending assignments can no longer be made. With this new preceptor linkage there is no longer a need to utilize the PC attending assignment designation when assigning patients to positions. The PCP will be established through the link. The GUI screens that allowed the PC attending assignments have been adjusted to remove that functionality. They include the following.

> Multiple Patient Assignment
> Multiple Patient Reassignment
> Position Information screen

B. Preceptor Assignment
A Preceptor button has been added on the Primary Care Team Position Setup screen under the current Staff button. The Preceptor button launches the user into the Preceptor Assignment screen. The Preceptor Assignment screen functions exactly like the Staff Assignment screen, except preceptor positions are selected/filed instead of staff. The Preceptor Assignment screen will include the name of the preceptor once assigned, the effective date of the assignment, status, and status reason. Preceptor history information will be retained and displayed. When the Assign button is clicked the Preceptor Lookup Screen will display. The Preceptor Lookup Screen will list all of the currently valid preceptor positions for the team.

Once a preceptor is assigned it will be displayed on the General Tab. The preceptor field will display the current preceptor assignment.

Assignment of a preceptor position locks the precepted position and the preceptor position into a "Preceptor Link". For preceptor positions, the Staff Assignment form will not close if there is not a current staff assignment. For precepted positions, the Preceptor Assignment form will not close if there are current or future patient assignments and there is not a current preceptor assignment. When a position becomes part of a preceptor link, the "Can Act As Primary Care" and "Can Act as Preceptor" checkboxes on the Settings tab will not be allowed to change.

Positions with "Can Act as Preceptor" checked will have the Preceptor button disabled.

C. Messages
On the Messages tab, a Preceptor checkbox has been added for each message type. Checking the box will result in the current preceptor receiving the mail notification in addition to the current staff assigned to the position. The preceptor checkboxes will be disabled for positions with 'Can Act as Preceptor' checked.

D. Patient Team Position Assignment Screen
The information display columns have been changed to the following order: PC, Team Member, Position, Preceptor (PCP name), Standard Role. The AT column has been removed. The PC column will use an * to identify PCP positions and an x to identify AP positions.

E. Team Patient Listings Report

As a result of the changes to the PCMM **V***IST***A** reports, the Patient Status radio check box will no longer be needed and has been removed from the report form.

II. Server Side

- Several changes have been made to various reports. The following options have been adjusted so that the PCP and AP information for each patient is correctly displayed.

Non PCMM Options

ACRP Ad Hoc Report	[SCRPW AD HOC REPORT]
Appointment List	[SDLIST]
Appointment Management	[SDAM APPT MGT]
Load/Edit Patient Data	[DG LOAD PATIENT DATA]
Patient Inquiry	[DG PATIENT INQUIRY]
Patient Profile MAS	[SDPATIENT]

PCMM Options

DPA	Detailed Patient Assignments (formerly Detailed Patient Enrollments)
ITP	Individual Team Profile
PATA	Patient Listing for Team Assignments (formerly Patient with Team Assignments)
PD	Practitioner Demographics
PP	Practitioner's Patients
SLT	Summary Listing of Teams (formerly Summary of Teams)
TML	Team Member Listing (formerly Team's Members)
TPL	Team Patient Listing (formerly Team's Patients)

Primary Care Team/Posn Assign or Unassign

- The following menu and reports have been created to help manage the PCMM data. New reports have also been added to support the new functionality.

Menu Option
HAR   Historical Assignment Reports

Report Options
PAD   Historical Patient Assignment Detail
Used for printing all provider, position and team assignments that exist for a patient during a specified date range.

PRAL   Historical Provider Position Assignment Listing
Used for printing provider position assignments that exist during a specified date range.

PTAL   Historical Patient Position Assignment Listing
Used for printing patient position assignments that exist during a specified date range.

TAS Historical Team Assignment Summary
Used for printing counts of team and team position assignments and unique patients within a specified date range.

PCMM Inconsistency Report
This report prompts the user for those team and position assignments that are to be validated according to the business rules that have been established for PCMM and the relationship between associate provider and preceptor. This report will be run as part of the installation process to get a summary of information. The PCMM Inconsistency Report checks for the following inconsistencies.

- Patient has no staff assigned.
- Patient has no PCPs assigned.
- Patient has multiple PCPs assigned.
- Associate Provider & PCP are the same for the same patient.
- Associate Provider is without a Preceptor.
- Associate Provider is not designated for PC.
- Preceptor is not designated for PC.

TECHNICAL RELEASE NOTES

I. V*IST*A Client Changes
The client version for this release of the PCMM software is *1.2.0.0.* Version information may be viewed by clicking HELP|ABOUT.

The total size of SD_53_177.EXE is 1683 KB. This file will load the following files on each workstation.

PCMM.EXE	1369 KB
PCMM.HLP	115 KB
RESIZER.DLL	559 KB
RESIZABLECONTROL.DLL	130 KB

A. Mail Messages
PCMM Reports users will be able to select "P-MESS" as an output device.

B. Kernel Security
PCMM client version 1.2.0.0 will look to "SCMC PCMM GUI WORKSTATION" to verify user access to remote procedures. Client versions prior to 1.2.0.0 look to "SC PCMM GUI WORKSTATION". This option has been placed out of order and should not be enabled under any circumstances. Users with programmer access will continue to be able to use old client versions, but should do so only for trouble-shooting purposes.

II. V*IST*A Server Changes

The server version for this release of the PCMM software is *SD*5.3*177.*

A. Data Dictionary Changes

Existing Files

SCHEDULING EVENT (403.43)	New scheduling events have been added.
SCHEDULING REASON (403.44)	New Scheduling reasons have been added.
OUTPATIENT PROFILE (404.41)	Two fields have been starred for deletion.
	*CURRENT PC ATTENDING (202)
	*CURRENT PC ATTENDING POSITION (205)

POSITION ASSIGNMENT HISTORY   Update to .01 field.
(404.52)   Two new fields:
                                        USER ENTERING (.07)
                                        DATE/TIME ENTERED (.08)
TEAM POSITION (404.57)   One field has been starred for deletion.
                                        *PRECEPTOR POSITION
                                     Eleven new fields.
                                        PRECEPTOR DEATH MESSAGE (2.05)
                                        PRECEPTOR INPATIENT MESSAGE (2.06)
                                        PRECEPTOR TEAM MESSAGE (2.07)
                                        PRECEPTOR CONSULT MESSAGE (2.08)
                                        FUTURE # OF PC PATIENTS (202)
                                        FUTURE # OF PATIENTS (203)
                                        CURRENT PRECEPTOR POSITION (305)
                                        CURRENT PRECEPTOR (306)
                                        ACTIVE PRECEPTS (307)
                                        ALLOW PRECEPTED CHANGE (400)
                                        ALLOW PRECEPTOR CHANGE (401)

ACRP REPORT TEMPLATE PARAMETER (409.92)

New Files

PCMM PARAMETER (404.44)
PCMM SERVER PATCH (404.45)
PCMM CLIENT PATCH (404.46)
PCMM HL7 EVENT (404.48)
PCMM HL7 ID (404.49)
PRECEPTOR ASSIGNMENT HISTORY (404.53)

B. Mail Groups
New mail groups have been added to support HL7 transmission of primary care
data to the Austin Automation Center.

   PCMM AUSTIN REPORTS
   PCMM HL7 MESSAGES

C. New Options

Historical Patient Assignment Detail   [SC PCMM HIST ASSIGN DETAIL]
Historical Provider Position Assignment Listing   [SC PCMM HIST PROV ASSIGN LIST]
Historical Patient Position Assignment Listing   [SC PCMM HIST PAT ASSIGN DETAIL]
Historical Team Assignment Summary   [SC PCMM HIST TEAM ASSIGN SUM]
PCMM HL7 Resubmit Rejects   [SCMC PCMM HL7 REJECTS]*

*Currently out-of-order - released for future use

D. "B"-Type Options

Updated

SC PCMM GUI WORKSTATION   placed out of order; should NOT be reactivated.

New

SCMC PCMM GUI WORKSTATION   replaces inactivated "B" option

E. APIs

Updated

OUTPTAP^SDUTL3(DFN,SCDATE)   ;given patient, return internal^external of the
                                   pc associate provider.

New

GETALL^SCAPMCA(DFN,SCDT,SCARR)   ;Get all assignment information

F. HL7

Batch Job
SCMC PCMM HL7 TRANSMIT

Protocol
PCMM SEND CLIENT FOR ADT-A08
PCMM SEND SERVER FOR ADT-A08

HL7 Application Parameter
PCMM

HL Lower Level Protocol Parameter
PCMM

HL Logical Link
PCMM

G. List Template

<u>Updated</u>

SDAM APPT MGT: The Top Margin field (.06) will be set to 6.

H. Associated Patches

The following **V**IST**A** packages anticipate a future release of a patch to use the preceptor information.

    CPRS   OR*3*65
    PCE   PX*1.0*78