Patient Representative V. 2.0 Installation Guide & Release Notes

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Installation Guide

This software was developed with Kernel V. 7.1 (Toolkit V. 7.2) and requires Kernel V. 7.1, VA FileMan V. 21, and PIMS (MAS) V. 5.3 or later versions. Journaling need not be suspended during the installation.

Please ensure that all QA end users are off the system. Other users may remain on. It is recommended that the installation be done at a time of low activity. Installation takes less than 10 minutes.

Resource Requirements

All reports use 80 column prints. Users should have at least a terminal and printer available.

CPU capacity is minimal.

Disk capacity: Multiply the number of records in the file times a minimum of 1.3K to a maximum of 2K.

Checklist Prior to Package Installation

New Issue Codes were shipped with this version of the software. **If you are running the first version of the software**, the installation **will not** convert the old codes to the new codes. Installation will set the old issue codes to inactive. After installation of the software, you will see only the new codes (both header codes and individual codes) beginning with two alpha characters.

The old codes will continue to show up in most reports. They will not appear in the spreadsheet report, Issue Code Headings (# Issues); only the new header codes will be printed.

- If your users built local Issue Codes using the option Issue Code Enter/Edit in Version 1.0, obtain a printout of these Issue Codes during installation of the software. With the list, they can rebuild the codes under the new header codes using the same option.

- If your users built any macros in Ad Hoc that they want to preserve, have them obtain a copy of the sort and print fields before you install this version by doing the following:

  Enter **[I** at the "Sort selection" prompt #1 and **??** at the "Inquire sort macro name". Enter the macro(s) that you want to see at the "Inquire sort macro name" prompt.

  Enter a sort selection to get to the "Print selection" prompt and repeat the same steps to obtain information on your print macros.

  All macros will be removed from the Ad Hoc Report with the installation of this new version of the software. You will need to rebuild those macros you want using the new Ad Hoc Report.

- If your site has Patient Representatives, or positions comparable, working for services or wards and the Patient Rep ADPAC wants them to have access only to those records they created, then do the following:

  Obtain a list of those users and give them the new User Menu (QAC USER) after installing the program. It contains the options: Edit Contact Record, Enter New Contact, and Send or Kill an Alert.

Process

Do not delete any of the QAQ* routines prior to loading this package. A pre-init routine will take care of the loading and/or deleting of the appropriate QAQ routines.

1. There are two reports in the installation that you may want to send to a device for a hard copy. Make sure a printer is available.

2. Load the QAC*, QAQI*, and QAI* routines into the account where the ^QA global resides or where you want it to reside. If ^QA global does not exist, please place it by using the GLOMAN (DSM), %GCH (MSM), or other appropriate global utility.

```
QACADHOC   QACALRT0   QACALRT1   QACALRT2   QACARCH    QACCODE    QACCONV0   QACDAILY
QACDELT    QACEDIT    QACGEN     QACIN001   QACIN002   QACIN003   QACIN004   QACIN005
QACIN006   QACIN007   QACIN008   QACIN009   QACIN00A   QACIN00B   QACIN00C   QACIN00D
QACIN00E   QACIN00F   QACIN00G   QACIN00H   QACIN00I   QACIN00J   QACIN00K   QACIN00L
QACIN00M   QACIN00N   QACIN00O   QACIN00P   QACIN00Q   QACIN00R   QACIN00S   QACIN00T
QACIN00U   QACIN00V   QACIN00W   QACIN00X   QACIN00Y   QACIN00Z   QACIN010   QACIN011
QACIN012   QACIN013   QACIN014   QACIN015   QACIN016   QACINIS    QACINIT    QACINIT1
QACINIT2   QACINIT3   QACINIT4   QACINIT5   QACINST    QACIPOST   QACIPRE0   QACIPST1
QACKEY     QACNEW     QACNGRSS   QACNOPTS   QACNTEG    QACPAT     QACPRT     QACRPT
QACSPRD    QACSPRD1   QACSPRD2   QACSPRD3   QACSRPT    QACSTAT    QACUTIL    QAIADLAU
QAIAHOC0   QAIAHOC1   QAIAHOC2   QAIAHOC3   QAIAHOC4   QAIAHOCH   QAIAHOCX   QAIAHOCY
QAIAHOCZ   QAIAPGRP   QAIAUDIT   QAIAUTL    QAIAXREF   QAIDATE    QAINTEG    QAIPKGVR
QAISELCT   QAISITE    QAQIMENU   QAQIN001   QAQIN002   QAQIN003   QAQIN004   QAQIN005
QAQIN006   QAQIN007   QAQIN008   QAQIN009   QAQIN00A   QAQIN00B   QAQIN00C   QAQIN00D
QAQIN00E   QAQINIS    QAQINIT    QAQINIT1   QAQINIT2   QAQINIT3   QAQINIT4   QAQINIT5
QAQIPRE    QAQIPRE0
```

3. **D ^QACINST**

4. Run the NTEG for the QAC* and QAQ* routines then delete the QACI* and QAQI* routines following the installation.

5. If your site did not use the previous version, assign the QAC MAIN menu to the Patient Representative ADPAC. Any key assignments can be done by owners of the QAC MAIN menu. Tell the ADPAC to read through the Package Management section and the Set-up and Maintenance menu of the Patient Representative User Manual and also the Release Notes section of this guide.

Installation

The following is an example of an installation over Patient Representative Version 1.0.

```
>D ^QACINST


Beginning installation of Patient Representative Version 2.0.

You are running Version 1.6 of the QA Integration Module.

      I have to update the QA Integration Module to version 1.7

This version (#1.7) of 'QAQINIT' was created on 01-JUN-1995
          (at HINES ISC, by VA FileMan V.21.0)

I HAVE TO RUN AN ENVIRONMENT CHECK ROUTINE.
I AM GOING TO SET UP THE FOLLOWING FILES:

   740        QUALITY ASSURANCE SITE PARAMETERS
Note:  You already have the 'QUALITY ASSURANCE SITE PARAMETERS' File.

   740.1      AD HOC MACRO
Note:  You already have the 'AD HOC MACRO' File.

   740.5      QA AUDIT
Note:  You already have the 'QA AUDIT' File.

SHALL I WRITE OVER FILE SECURITY CODES? NO// Y  (YES)
NOTE: This package also contains INPUT TEMPLATES
      SHALL I WRITE OVER EXISTING INPUT TEMPLATES OF THE SAME NAME? YES//
<RET>  (YES)
NOTE: This package also contains OPTIONS
      SHALL I WRITE OVER EXISTING OPTIONS OF THE SAME NAME? YES// <RET>  (YES)

ARE YOU SURE EVERYTHING'S OK? NO// Y  (YES)

Install/Clean-up QM Integration Module routines.

Loading QAIADLAU    Replacing QAQADLAU    Deleting QAIADLAU
Loading QAIAHOC0    Replacing QAQAHOC0    Deleting QAIAHOC0
Loading QAIAHOC1    Replacing QAQAHOC1    Deleting QAIAHOC1
Loading QAIAHOC2    Replacing QAQAHOC2    Deleting QAIAHOC2
Loading QAIAHOC3    Replacing QAQAHOC3    Deleting QAIAHOC3
Loading QAIAHOC4    Replacing QAQAHOC4    Deleting QAIAHOC4
Loading QAIAHOCH    Replacing QAQAHOCH    Deleting QAIAHOCH
Loading QAIAHOCX    Replacing QAQAHOCX    Deleting QAIAHOCX
Loading QAIAHOCY    Replacing QAQAHOCY    Deleting QAIAHOCY
Loading QAIAHOCZ    Replacing QAQAHOCZ    Deleting QAIAHOCZ
Loading QAIAPGRP    Replacing QAQAPGRP    Deleting QAIAPGRP
Loading QAIAUDIT    Replacing QAQAUDIT    Deleting QAIAUDIT
Loading QAIAUTL     Replacing QAQAUTL     Deleting QAIAUTL
Loading QAIAXREF    Replacing QAQAXREF    Deleting QAIAXREF
Loading QAIDATE     Replacing QAQDATE     Deleting QAIDATE
Loading QAINTEG     Replacing QAQNTEG     Deleting QAINTEG
```

```
Loading QAIPKGVR     Replacing QAQPKGVR     Deleting QAIPKGVR
Loading QAISELCT     Replacing QAQSELCT     Deleting QAISELCT
Loading QAISITE      Replacing QAQSITE      Deleting QAISITE

...HMMM, LET ME THINK ABOUT THAT A MOMENT...............................
'QAQ MANAGER' Option Filed
'QAQ PACKAGES INQUIRE' Option Filed
'QAQ SITE PARAMETERS' Option Filed
'QAQ USER' Option Filed......
OK, I'M DONE.
NOTE THAT FILE SECURITY-CODE PROTECTION HAS BEEN MADE


You are running Version 1.7 of the QA Integration Module.
Now installing Patient Representative Version 2.0.


This version (#2.0) of 'QACINIT' was created on 01-JUN-1995
        (at HINES ISC, by VA FileMan V.21.0)


I HAVE TO RUN AN ENVIRONMENT CHECK ROUTINE.
I AM GOING TO SET UP THE FOLLOWING FILES:

   745.1     CONSUMER CONTACT
Note:  You already have the 'CONSUMER CONTACT' File.

   745.2     CONTACT ISSUE CODE  (including data)
Note:  You already have the 'CONTACT ISSUE CODE' File.
I will OVERWRITE your data with mine.

   745.3     *QUALITY MATRIX  (including data)
*BUT YOU ALREADY HAVE 'QUALITY MATRIX' AS FILE #745.3!
Shall I change the NAME of the file to *QUALITY MATRIX? NO// **YE**S

   745.3     *QUALITY MATRIX  (including data)
Note:  You already have the '*QUALITY MATRIX' File.
I will OVERWRITE your data with mine.

   745.4     CONGRESSIONAL OFFICE

SHALL I WRITE OVER FILE SECURITY CODES? NO// **Y**  (YES)
NOTE: This package also contains SORT TEMPLATES
      SHALL I WRITE OVER EXISTING SORT TEMPLATES OF THE SAME NAME? YES//**<RET>**
(YES)
NOTE: This package also contains PRINT TEMPLATES
      SHALL I WRITE OVER EXISTING PRINT TEMPLATES OF THE SAME NAME? YES//
**<RET>**  (YES)
NOTE: This package also contains SECURITY KEYS
      SHALL I WRITE OVER EXISTING SECURITY KEYS OF THE SAME NAME? YES//**<RET>**
(YES)
NOTE: This package also contains OPTIONS
      SHALL I WRITE OVER EXISTING OPTIONS OF THE SAME NAME? YES// **<RET>**  (YES)


ARE YOU SURE EVERYTHING'S OK? NO// **Y**  (YES)
```

```
...SORRY, LET ME THINK ABOUT THAT A
MOMENT......................................
..........................................................
'QAC ADHOC' Option Filed
'QAC ALERT' Option Filed
'QAC ARCHIVE' Option Filed
'QAC CODE' Option Filed
'QAC CONGRESSIONAL' Option Filed
'QAC DAILY CONTACTS' Option Filed
'QAC EDIT' Option Filed
'QAC EMP TOTALS' Option Filed
'QAC EMPLOYEE' Option Filed
'QAC ISSUE TOT' Option Filed
'QAC KEY' Option Filed
'QAC MAIN MENU' Option Filed
'QAC NEW' Option Filed
'QAC NOPATIENT' Option Filed
'QAC OPEN STATUS' Option Filed
'QAC PARAMETERS EDIT' Option Filed
'QAC PATIENT RPT' Option Filed
'QAC PRT' Option Filed
'QAC PURGE' Option Filed
'QAC REPORT' Option Filed
'QAC RESP DUE' Option Filed
'QAC RPT' Option Filed
'QAC SERV ISSUE TOT' Option Filed
'QAC SERVICE TOTALS' Option Filed
'QAC SETUP MENU' Option Filed
'QAC SPREADSHEET RPT' Option Filed
'QAC STATISTICAL RPTS' Option Filed
'QAC STATUS' Option Filed
'QAC USER' Option Filed............
NOTE THAT FILE SECURITY-CODE PROTECTION HAS BEEN MADE

Old Issue Codes are now being inactivated.
```

You see the following prompt if there were any locally built issue codes that were inactivated. We suggest you answer YES and Queue your printout.

```
Do you want a list of your inactivated local issue codes? YES// <RET>

DEVICE: HOME// Q
```

If you had no locally built codes, you move on to the following. You may enter "^" at the Device and run the QACCONV0 routine at a later date.

The data from the SERVICES INVOLVED multiple (745.1,15->
745.115,.01, a pointer to the NATIONAL SERVICE file [#730])
will be moved to the SERV/SECT INVOLVED multiple (745.1,21->
745.121,1->745.1211,.01, a pointer to the SERVICE/SECTION file
[#49]). The conversion may be run multiple times without adverse
effects on the database. The SERVICES INVOLVED will be duplicated
for each ISSUE CODE. A report will be printed showing any
conversion problems/issues. It is recommended that you queue
this report. If you wish to run this conversion/report at a
later time, enter 'DO ^QACCONV0' at the M programmer prompt.

DEVICE: HOME// Q

Here's an example of the printout.

```
                    Patient Representative              Page: 1
                    Service Conversion Report           June 1, 1995
              * - indicates data not converted
-------------------------------------------------------------------------
Contact Number: 14000.940001
 * No Serv/Sect's for National Serv 'NURSING'.
 * No Serv/Sect's for National Serv 'NURSING HOME'.

Contact Number: 14000.940002
 * No Serv/Sect's for National Serv 'AMBULATORY CARE'.

Contact Number: 14000.940003
 * No Serv/Sect's for National Serv 'ENVIRONMENTAL MANAGEMENT'.

Contact Number: 14000.940004
 * No Serv/Sect's for National Serv 'ENVIRONMENTAL MANAGEMENT'.
 * No Serv/Sect's for National Serv 'PSYCHIATRY'.

....

Creating the QM User and Manager Menus....................

Installation of Patient Representative Version 2.0 complete!
```

Here's an example of a virgin installation.

>**D ^QACINST**

Beginning installation of Patient Representative Version 2.0.

You are running Version 1.6 of the QA Integration Module.

     I have to update the QA Integration Module to version 1.7

This version (#1.7) of 'QAQINIT' was created on 17-JUL-1995
          (at HINES ISC, by VA FileMan V.21.0)

I HAVE TO RUN AN ENVIRONMENT CHECK ROUTINE.
I AM GOING TO SET UP THE FOLLOWING FILES:

    740   QUALITY ASSURANCE SITE PARAMETERS
Note: You already have the 'QUALITY ASSURANCE SITE PARAMETERS' File.

    740.1   AD HOC MACRO
Note: You already have the 'AD HOC MACRO' File.

    740.5   QA AUDIT
Note: You already have the 'QA AUDIT' File.

SHALL I WRITE OVER FILE SECURITY CODES? No// **<RET>** (No)
NOTE: This package also contains INPUT TEMPLATES
      SHALL I WRITE OVER EXISTING INPUT TEMPLATES OF THE SAME NAME? Yes//
<RET> (Yes)
NOTE: This package also contains OPTIONS
      SHALL I WRITE OVER EXISTING OPTIONS OF THE SAME NAME? Yes// **<RET>** (Yes)

ARE YOU SURE EVERYTHING'S OK? No// **Y** (Yes)

Install/Clean-up QM Integration Module routines.

Loading QAIADLAU   Replacing QAQADLAU   Deleting QAIADLAU
Loading QAIAHOC0   Replacing QAQAHOC0   Deleting QAIAHOC0
Loading QAIAHOC1   Replacing QAQAHOC1   Deleting QAIAHOC1
Loading QAIAHOC2   Replacing QAQAHOC2   Deleting QAIAHOC2
Loading QAIAHOC3   Replacing QAQAHOC3   Deleting QAIAHOC3
Loading QAIAHOC4   Replacing QAQAHOC4   Deleting QAIAHOC4
Loading QAIAHOCH   Replacing QAQAHOCH   Deleting QAIAHOCH
Loading QAIAHOCX   Replacing QAQAHOCX   Deleting QAIAHOCX
Loading QAIAHOCY   Replacing QAQAHOCY   Deleting QAIAHOCY
Loading QAIAHOCZ   Replacing QAQAHOCZ   Deleting QAIAHOCZ
Loading QAIAPGRP   Replacing QAQAPGRP   Deleting QAIAPGRP
Loading QAIAUDIT   Replacing QAQAUDIT   Deleting QAIAUDIT
Loading QAIAUTL   Replacing QAQAUTL   Deleting QAIAUTL
Loading QAIAXREF   Replacing QAQAXREF   Deleting QAIAXREF
Loading QAIDATE   Replacing QAQDATE   Deleting QAIDATE
Loading QAINTEG   Replacing QAQNTEG   Deleting QAINTEG

```
Loading QAIPKGVR      Replacing QAQPKGVR      Deleting QAIPKGVR
Loading QAISELCT      Replacing QAQSELCT      Deleting QAISELCT
Loading QAISITE       Replacing QAQSITE       Deleting QAISITE


...EXCUSE ME, LET ME PUT YOU ON 'HOLD' FOR A
SECOND.............................
.
'QAQ MANAGER' Option Filed
'QAQ PACKAGES INQUIRE' Option Filed
'QAQ SITE PARAMETERS' Option Filed
'QAQ USER' Option Filed......
OK, I'M DONE.
NO SECURITY-CODE PROTECTION HAS BEEN MADE

You are running Version 1.7 of the QA Integration Module.
Now installing Patient Representative Version 2.0.

This version (#2.0) of 'QACINIT' was created on 17-JUL-1995
        (at HINES ISC, by VA FileMan V.21.0)

I HAVE TO RUN AN ENVIRONMENT CHECK ROUTINE.
I AM GOING TO SET UP THE FOLLOWING FILES:

    745.1    CONSUMER CONTACT

    745.2    CONTACT ISSUE CODE  (including data)
I will OVERWRITE your data with mine.

    745.3     *QUALITY MATRIX  (including data)
I will OVERWRITE your data with mine.

    745.4    CONGRESSIONAL OFFICE

NOTE: This package also contains SORT TEMPLATES

NOTE: This package also contains PRINT TEMPLATES

NOTE: This package also contains SECURITY KEYS

NOTE: This package also contains OPTIONS


ARE YOU SURE EVERYTHING'S OK? No// Y  (Yes)

...EXCUSE ME, HOLD
ON.......................................................
......................................
'QAC ADHOC' Option Filed
'QAC ALERT' Option Filed
'QAC ARCHIVE' Option Filed
'QAC CODE' Option Filed
'QAC CONGRESSIONAL' Option Filed
'QAC DAILY CONTACTS' Option Filed
'QAC EDIT' Option Filed
'QAC EMP TOTALS' Option Filed
'QAC EMPLOYEE' Option Filed
'QAC ISSUE TOT' Option Filed
'QAC KEY' Option Filed
```

'QAC MAIN MENU' Option Filed
'QAC NEW' Option Filed
'QAC NOPATIENT' Option Filed
'QAC OPEN STATUS' Option Filed
'QAC PARAMETERS EDIT' Option Filed
'QAC PATIENT RPT' Option Filed
'QAC PRT' Option Filed
'QAC PURGE' Option Filed
'QAC REPORT' Option Filed
'QAC RESP DUE' Option Filed
'QAC RPT' Option Filed
'QAC SERV ISSUE TOT' Option Filed
'QAC SERVICE TOTALS' Option Filed
'QAC SETUP MENU' Option Filed
'QAC SPREADSHEET RPT' Option Filed
'QAC STATISTICAL RPTS' Option Filed
'QAC STATUS' Option Filed
'QAC USER' Option Filed............
NOTE THAT FILE SECURITY-CODE PROTECTION HAS BEEN MADE

Old Issue Codes are now being inactivated.

The data from the SERVICES INVOLVED multiple (745.1,15->
745.115,.01, a pointer to the NATIONAL SERVICE file [#730])
will be moved to the SERV/SECT INVOLVED multiple (745.1,21->
745.121,1->745.1211,.01, a pointer to the SERVICE/SECTION file
[#49]). The conversion may be run multiple times without adverse
effects on the database. The SERVICES INVOLVED will be duplicated
for each ISSUE CODE. A report will be printed showing any
conversion problems/issues. It is recommended that you queue
this report. If you wish to run this conversion/report at a
later time, enter 'DO ^QACCONV0' at the M programmer prompt.

DEVICE: HOME// **<RET>**   HOME   RIGHT MARGIN: 80// **<RET>**

                         Patient Representative   Page: 1
                         Service Conversion Report   Jul 17, 1995
                     * - indicates data not converted

No conversion problems found.

Creating the QM User and Manager Menus....................

Installation of Patient Representative Version 2.0V2 complete!

Post Installation

There are four messages you may get when running the Patient Representative Service Conversion Report. Whenever you see "*", it means the service could not be converted.

Message:	**What to do:**
No conversion problems found.	Do nothing.
*No Issue Codes found, cannot convert services.	This means that for that particular record there is a service but no issue code. Service in this version of the software falls within the Issue Code multiple, therefore the service could not be converted. You can edit the record by adding an Issue Code.
* No Serv/Sect's for National Serv (Service name).	Edit File #49 using VA FileMan. Select the Service/Section that the National Service corresponds to and edit the field National Service.
Multiple Serv/Sect's for National Serv (Service name).	In this case, the contact record may need to be edited. If closed, reopen the record. Select each Issue Code and delete the service you do not want.

Rerun the routine QACCONV0 if you made corrections for either of the two messages with asterisks.

Release Notes

File Changes

1. CONSUMER CONTACT file (#745.1)

a. The Category of Care field #16 was starred for deletion. It will no longer be needed since the Quality Matrix changed its definitions. If the Quality Matrix wants data from this package, it can obtain what it needs by using the Treatment Status field (Inpatient, Outpatient, Domiciliary, or NHCU), the Services Involved field, and the issue code.

b. The Services Involved field #15 was starred for deletion. A new field, Serv/Sect Involved, that points to the SERVICE/SECTION file #49 instead of the NATIONAL SERVICE file #730 was added as a multiple under the Issue Codes field. This will allow the sites to obtain a more accurate count of issues by service and section.

In the previous version, each Issue Code for a contact could not be separated out by each service that was associated with the contact. A data conversion (from File #730 to File #49) during installation of the software placed every service associated with a contact under each Issue Code associated with the contact therefore not changing any of the previous numbers. If users want to, they can go back and edit any of the old contacts and place the Issue Codes with specific services. Any new contact entered will allow the user to enter an Issue Code and then one or more services associated with the Issue Code.

c. The Refer To field #18 is starred for deletion. It is now called Refer Contact To (multiple) and is a pointer to the NEW PERSON file #200. This allows the program to use this field with the Alert system to automatically send Reports of Contact to the entries in the Refer Contact To field.

d. Congressional Contact field #29 was added to File #745.1. It points to a new file, CONGRESSIONAL OFFICE file #745.4. There is a screen on this field to only see Active entries in the CONGRESSIONAL OFFICE file.

e. A new cross-reference (CMB) on field Contact Made By is used for sorting and by the Congressional Contact field. A Trigger cross reference is used to make sure anytime the Contact Made By field is edited, the Congressional Contact field is updated, edited, deleted.

f.   The Report of Contact Generated field #23 is starred for deletion.

g.   Survey ("S") was added as another code in the Source of Contact field #13.

2. CONTACT ISSUE CODE file (#745.2)

a. A trigger cross-reference was added to the Status field #4. Whenever the status is entered as 1 or Inactive, a date is entered in the Inactivation Date field. If the status is changed back to Local (active), then the date is deleted from the Inactivation Date field.

b. The Quality Aspect field #3 was starred for deletion.

c. Inactivation Date was added as a new field #6.

3. QUALITY MATRIX file (#745.3) is starred for deletion.

4. CONGRESSIONAL CONTACT file (#745.4) was added.

a. The Congressional Office field #29 in File #745.1 points to this new file. Anytime a user selects CO Congressional from the set of codes for the field Contact Made By, the user will also be able to select the office or person who made the contact.

b. The .01 field of this file, Office/Name, has two cross-references: a regular x-ref for sorting and look-up and an Uppercase x-ref.

Issue Codes

1. All old Issue Codes (any issue code beginning with one (1) Alpha character) will be set Inactive. This will remove the issue codes from any look-up lists in the program. Most reports, excluding any that look at just header codes , will still print data concerning the old codes.

2. Contact Issue Code numbers now begin with 2 Alpha characters that relate somewhat to the header issue (e.g., CA for PATIENT CARE, TI for TIMELINESS, CC for COURTESY / COMMUNICATION, etc.)

3. Issue Code prompt

a. At the "Select ISSUE CODE:" prompt, the user can enter "?ISSUE CODE" (e.g., ?CA04) and get the definition for the code.

Example:

Select ISSUE CODE: **?CA04**

CA04   Implementation of procedures

The patient/family believes the appropriate procedure(s) were not implemented to achieve the optimal care/needs of the patient.

b. If the users want to see a display of previously entered Issue Codes with the service/section involved, see Site Parameters.

Option Changes

1. Enter New Contact.

   a. We are displaying the Rated Disabilities of a patient following the display of patient data (SSN, age, sex, etc.).

   b. The user will no longer see the prompts for:
      Category of Care
      Refer To
      Services Involved

   c. There are three new fields:

      Refer Contact To: points to the New Person file #200.
      Serv/Sect Involved: multiple points to the Service/Section file #49
      Congressional Office: appears when CO for Contact Made is selected

2. Patient Representative Keys - A QAC EDIT key was added to the software and users may be given the key via this option. Only users holding the QAC EDIT key (Patient Rep Edit Key) can edit any record. Other users may only edit records they have created.

3. Report of Contact - The confidentiality statement was removed from the ROC and replaced with "This information is not for the Patient Record".
"Distribution:" was removed from the ROC. Instead, data from the Refer Contact To field was added.

4. Ad Hoc Report - No Macro reports were sent with this version of the software. Each of the macros from version 1.0 were turned into separate options in this version. If the users at your site have defined specific macros for their site, they should copy the sort and print fields and their modifiers for those reports before installing this software.

5. Contact Inquiry - Users may now print inquiries for all records falling within a selected date range.

New Options

1. Set-up and Maintenance Menu

Archive Report - This option does not purge records but provides an output of selected contact record data that can be saved to a file, printed, or captured for a word processing package. Records can then be purged using the option Purge Contact Records.

Congressional Contact Enter/Edit - Users may enter offices or names for congressional contacts into the CONGRESSIONAL OFFICE file #745.4 via this option. These congressional contacts are used as a look-up list for the Congressional Contact field # 29 during entry or edit of a contact record. The Congressional Contact field only appears when the user enters CO as the Contact Made By.

Purge Contact Records - This option purges all records that fall within the selected date range.

Site Parameters Edit

 a. One displays the previously entered Issue Codes and Services in the Edit option just prior to the Select ISSUE CODE field.

 b. The second automatically sends the ROC to entries in the Refer Contact To field using the Alert system.

2. Responses Due - This option prints a report of all Open cases whose responses are due within a selected time frame.

3. Send or Kill an Alert - See the Report of Contact Alerts section.

4. Reports Menu - Many of these reports used to be obtained via Ad Hoc.

Patient Name with Brief Data - This option lists for a selected date range and patients, the patient name, SSN, contact record number, issue codes, services and Issue text.

Contacts with No Patient Identified - This report prints out all contact records for a selected date range that are not contacts for a specific patient.

Daily List of Patient Contacts - This listing provides a daily printout of contacts for the selected days.

Report by Employee - This print provides the contact record number, patient name, date of the contact, location and issue text for contacts concerning employees.

List of Open Cases - This print provides a listing of open cases for a selected date range.

Statistical Reports Menu - Each report in this menu prints a count by the subject in the option name.

> Employee Contact Totals
> Issue Totals for All, Male, or Female
> Service Issue Totals
> Service/Section Contact Totals
> Spreadsheet Report: Contains 9 different spreadsheet totals for subject. Commas are used as delimiters between the subject and count.

User Menu - A User Menu was added for those sites that want certain users to enter new contacts and edit only those contacts. The option also provides the ability to send Reports of Contact via the alert system. This menu contains the following options.

> Enter New Contact
> Edit Contact Record
> Send or Kill an Alert

Keys

The QAC EDIT key is new. Only users holding the QAC EDIT key (Patient Rep Edit Key) can edit any record. Other users may only edit records they have created or send/kill alerts (ROCs) on records they created. Users can be given this key via the option Patient Representative Keys.

The QAC CONTACT key is unchanged.

Report of Contact Alerts

If the site chooses to send Reports of Contact automatically via the Alert System, the field Automatic ROC Alert in the Site Parameters Edit option must contain a YES. When the field contains a YES, any entry (person) in the field Refer Contact To will receive a Report of Contact via the Alert system. Responses to the alert are automatically laid into the field Resolution Comments where they can be edited. The option Send or Kill an Alert also requires that a YES be entered in the automatic ROC Alert field.

If the site chooses not to send ROCs in this manner, the site can send a mail message containing the ROC using P-MESS at the device prompt in the option Report of Contact. Responses to the mail message will not be automatically laid into the Resolution Comments field.

When the Alert system is used, each recipient gets a separate alert so their responses are not seen by any other person. Responses by the recipient to the alert are automatically laid into the field Resolution Comments and may be edited further by the Patient Rep. If a response cannot be automatically sent at the time it is entered, it is tasked until it can be laid into the record. This should only happen if the record is being edited at the time the response is sent. Also, if the user begins to respond and then times out, the partial response is saved for at least 2 weeks for editing. Any Alert not answered may be purged from the system by IRM. Once a response is entered and saved, editing by the sender of the response is not possible (this is similar to the way MailMan works). Editing of any response can be done via the field Resolution Comments by the Patient Representative.

Responses to Alerts trigger an Information Only Alert back to the original sender of the ROC.

Send or Kill an Alert: This option is used to send a Report of Contact to any DHCP user. It allows the user to enter a response. The response is automatically added to the Resolution Comments field of the CONSUMER CONTACT file #745.1.

Write Statements

All Write statements were removed from the DDs except for Identifier Write statements.