Group Notes/
Encounter Collection
Implementation Guide

October 2004

Department of Veterans Affairs
Health Systems Design & Development
Computerized Patient Record System Product

Revision History

First Draft	October 18, 2004

Table of Contents

Introduction

Purpose of Group Notes

This program was designed to assist providers in documenting group therapy sessions and events such as immunization clinics. It allows the easy assembly of patient groups based on Clinics, Specialties, Wards, Teams, or Provider lists. It then allows the note author to specify parts of a note that apply to the entire group and parts that apply to individuals. It does the same with encounter data. After the note and encounter information is complete, it provides for a single signature for the entire group.

Scope of the Manual

Tasks associated with Group Notes are: System setup, workstation setup, creation of notes for a group, and collection of encounter data. This manual provides information deemed necessary to carry out these functions.

From time to time improvements are made to the TIU package, including improvements to Group Notes. The latest information about TIU, as well as the latest version of this manual, is posted on the Text Integration Utilities (TIU) Web Page at:

```
vista.med.va.gov/tiu/html/Enhance.htm
                    or
vaww.vista.med.va.gov/tiu/html/Enhance.htm
```

This document is intended for use during development and testing of the Group Notes executable. When Group Notes is released this document will cease to exist as a living document and the information in it will be inserted into the appropriate VistA manuals. (However, the document will continue to be available on the above page—it will not be updated with post-release changes.)

Also on release, information about Group Notes will be available on the TIU page of the VDL (VistA Document Library) at www.va.gov/vdl/Clinical.asp?appID=65.

Audience

Information in this manual is intended for Veterans Affairs Medical Center (VAMC) Information Resource Management Service (IRMS) staff members and Clinical Application Coordinators (CAC's).

Setup Section

Vista System Setup

To make Group Notes available to appropriate providers you must perform the following operations on the VistA system:

1. Install patch OR*3.0*222.
2. Give providers who will use Group Notes OR CPRS GUI CHART as a secondary menu option.
3. The OR GN ACCESS key for users with Group Notes privileges.
4. Set locations authorized to use Group Notes.
5. Create note titles with appropriate boilerplate and cosigners for use with Group Notes.

OR*3.0*222

Even though Group Notes makes no changes to routines on the Mumps side, it will not run without certain objects being present. These are:

1. Adding secondary menu OR CPRS GUI CHART to users with Group Notes privileges.
2. The OR GN ACCESS key for users with Group Notes privileges.
3. CPRS version 24 or later.

Locations

Being able to set locations where it is allowed to use Group Notes is one of the security features. Locations help prevent Group Notes from being used in an inappropriate fashion, such as for doctor's rounds.

There are two ways to set locations: Via a parameter or with a menu. The parameter is OR GN LOCATIONS. The menu is OR GN SET LOCATIONS.

OR GN LOCATIONS

To establish locations you must set OR GN LOCATIONS with the XPAR menu General Parameter Tools. In the following example, PTSD CLINIC is set as a Group Notes location:

```
Select OPTION NAME: XPAR MENU TOOLS General Parameter Tools

   LV      List Values for a Selected Parameter
   LE      List Values for a Selected Entity
   LP      List Values for a Selected Package
   LT      List Values for a Selected Template
   EP      Edit Parameter Values
   ET      Edit Parameter Values with Template
   EK      Edit Parameter Definition Keyword

Select General Parameter Tools Option: EP Edit Parameter Values
                      --- Edit Parameter Values ---

Select PARAMETER DEFINITION NAME: OR GN LOCATIONS OR GROUP NOTES LOCATIONS

OR GN LOCATIONS may be set for the following:

        1 Division    DIV    [SALT LAKE CITY]
        2 System      SYS    [EXPCUR.FO-SLC.MED.VA.GOV]
        3 Package     PKG    [ORDER ENTRY/RESULTS REPORTING]

Enter selection: 1 Division SALT LAKE CITY

----------- Setting OR GN LOCATIONS for Division: SALT LAKE CITY -----------
Select Sequence: ?

Sequence Value
-------- -----
1       BARB'S CLINIC
2       TEST/PROSTHETICS
3       NEURO CLINIC

Select Sequence: 4
Are you adding 4 as a new Sequence? Yes// <Enter> YES
Sequence: 4// <Enter> 4
Select a location for GroupNote: PTSD CLINIC
Select Sequence: ?

Sequence Value
-------- -----
1       BARB'S CLINIC
2       TEST/PROSTHETICS
3       NEURO CLINIC
4       PTSD CLINIC

Select Sequence: <Enter>
```
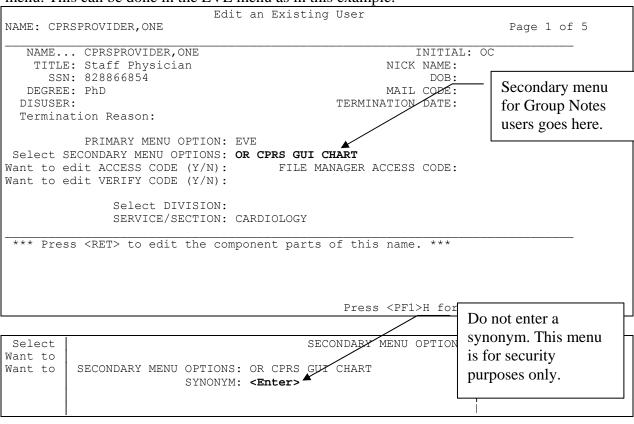
OR GN SET LOCATIONS

This menu can be given to select individuals outside of IRMS (Information Resource Management Service) to help expedite Group Notes setup.

In the following example, OR GN SET LOCATIONS is used to add the parameter OR GN LOCATIONS to a site.

```
Select OPTION NAME: OR GN SET LOCATIONS        Group Notes Locations Set-up
Group Notes Locations Set-up

OR GROUP NOTES LOCATIONS may be set for the following:

     1   Division      DIV    [SALT LAKE CITY]
     2   System        SYS    [EXPCUR.FO-SLC.MED.VA.GOV]

Enter selection: 1  Division   SALT LAKE CITY

------- Setting OR GROUP NOTES LOCATIONS  for Division: SALT LAKE CITY -------
Select Sequence: 1

Sequence: 1// <Enter>    1
Select a location for GroupNote: BARB'S CLINIC// ?
 Answer with HOSPITAL LOCATION NAME, or ABBREVIATION, or TEAM
 Do you want the entire 131-Entry HOSPITAL LOCATION List? N  (No)

Select a location for GroupNote: BARB'S CLINIC// AUDIOLOGY AND SPEECH PATHOLOGY

Select Sequence: ?

Sequence  Value
--------  -----
1         AUDIOLOGY AND SPEECH PATHOLOGY
2         BARB'S CLINIC 2
3         1AS
5         381TEST
6         381TEST
7         MOMM


Select Sequence:
```

OR CPRS GUI CHART

Each Group Notes user must have OR CPRS GUI CHART assigned as a secondary menu. This can be done in the EVE menu as in this example:

```
                            Edit an Existing User
NAME: CPRSPROVIDER,ONE                                       Page 1 of 5
_____
   NAME... CPRSPROVIDER,ONE                          INITIAL: OC
    TITLE: Staff Physician                         NICK NAME:
      SSN: 828866854                                     DOB:
   DEGREE: PhD                                     MAIL CODE:
  DISUSER:                                 TERMINATION DATE:
  Termination Reason:


          PRIMARY MENU OPTION: EVE
  Select SECONDARY MENU OPTIONS: OR CPRS GUI CHART
Want to edit ACCESS CODE (Y/N):      FILE MANAGER ACCESS CODE:
Want to edit VERIFY CODE (Y/N):

             Select DIVISION:
             SERVICE/SECTION: CARDIOLOGY
_____
 *** Press <RET> to edit the component parts of this name. ***




                                      Press <PF1>H for
```

Secondary menu for Group Notes users goes here.

```
 Select  |                          SECONDARY MENU OPTION
Want to  |
Want to  |  SECONDARY MENU OPTIONS: OR CPRS GUI CHART
         |            SYNONYM: <Enter>
         |
         |
```

Do not enter a synonym. This menu is for security purposes only.

```
                            Edit an Existing User
NAME: CPRSPROVIDER,ONE                                       Page 1 of 5
_____
   NAME... CPRSPROVIDER,ONE                          INITIAL: OC
    TITLE: Staff Physician                         NICK NAME:
      SSN: 828866854                                     DOB:
  DEGREE: PhD                                      MAIL CODE:
  DISUSER:                                 TERMINATION DATE:
  Termination Reason:


          PRIMARY MENU OPTION: EVE
  Select SECONDARY MENU OPTIONS: OR CPRS GUI CHART
Want to edit ACCESS CODE (Y/N):      FILE MANAGER ACCESS CODE:
Want to edit VERIFY CODE (Y/N):

             Select DIVISION:
             SERVICE/SECTION: CARDIOLOGY
_____
 *** Press <RET> to edit the component parts of this name. ***




                          Press <PF1>H for help    Insert
```

OR GN ACCESS

Each provider who uses Group Notes needs the OR GN ACCESS key. In the following example a single user is given this key:

```
XUKEYMGMT      Key Management


          Allocation of Security Keys
          De-allocation of Security Keys
          Enter/Edit of Security Keys
          All the Keys a User Needs
          Change user's allocated keys to delegated keys
          Delegate keys
          Keys For a Given Menu Tree
          List users holding a certain key
          Remove delegated keys
          Show the keys of a particular user

Select Key Management Option: ALLOcation of Security Keys

Allocate key: OR GN ACCESS

Another key:

Holder of key: CPRSPROVIDER  CPRSPROVIDER,ONE      OC       CARDIOLOGY        Staff
 Physician

Another holder: <Enter>

You've selected the following keys:

OR GN ACCESS

You've selected the following holders:

CPRSPROVIDER,ONE

You are allocating keys.  Do you wish to proceed? YES// <Enter>

OR GN ACCESS being assigned to:
     CPRSPROVIDER,ONE

          Allocation of Security Keys
          De-allocation of Security Keys
          Enter/Edit of Security Keys
          All the Keys a User Needs
          Change user's allocated keys to delegated keys
          Delegate keys
          Keys For a Given Menu Tree
          List users holding a certain key
          Remove delegated keys
          Show the keys of a particular user

Select Key Management Option:
```

Note Titles

The two considerations related to group notes in setting up note titles are allowing for a co-signer and including boilerplate.

Co-Signer

The following setup will include the expected co-signer field if the note is entered by a STUDENT and appropriate business rules are in place to require a co-signer for the STUDENT class:

```
Select OPTION NAME: DOCUMENT PARAMETER EDIT  TIU DOCUMENT PARAMETER EDIT    Doc
ument Parameter Edit
Document Parameter Edit
First edit Institution-wide parameters:

Select DOCUMENT DEFINITION: PROGRESS NOTES       CLASS
        ...OK? Yes// <Enter>  (Yes)

DOCUMENT DEFINITION: PROGRESS NOTES// <Enter>
REQUIRE RELEASE: NO// <Enter>
REQUIRE MAS VERIFICATION: UPLOAD ONLY// <Enter>
REQUIRE AUTHOR TO SIGN: YES//<Enter>
ROUTINE PRINT EVENT(S): <Enter>
STAT PRINT EVENT(S): <Enter>
MANUAL PRINT AFTER ENTRY: YES// <Enter>
ALLOW CHART PRINT OUTSIDE MAS: YES//<Enter>
ALLOW >1 RECORDS PER VISIT: YES// <Enter>
ENABLE IRT INTERFACE: NO  NO
SUPPRESS DX/CPT ON ENTRY: NO// <Enter>
FORCE RESPONSE TO EXPOSURES: YES// <Enter>
ASK DX/CPT ON ALL OPT VISITS: YES// <Enter>
SEND ALERTS ON ADDENDA: <Enter>
ORDER ID ENTRIES BY TITLE: <Enter>
SEND ALERTS ON NEW ID ENTRY: <Enter>
SEND COSIGNATURE ALERT: <Enter>

If document is to be uploaded, specify Filing Alert Recipients:

Select FILING ERROR ALERT RECIPIENTS: TEST,DOCTOR// <Enter>

Now enter the USER CLASSES for which cosignature will be required:

Select USERS REQUIRING COSIGNATURE: STUDENT//<Enter>
```

The field for designating a cosigner appears only if the author of the note requires a cosigner. The requirement for cosigner is a product of the author's User Class and the set up of the document in TIU.

Boilerplate

Adding appropriate boilerplate to the document definition can save time. Remember these basic rules about boilerplate:

- Do not use TIU objects in the boilerplate unless the value produced would be true for all patients in the group.
- Provide general information that would be true for all members of the group and the group as a whole.
- Boilerplate may be edited for a group in the Common Note Content pane of Group Notes. The Common Note Contents pane allows modification, addition to, or deletion from the boilerplate text.

Examples of boilerplate that can be effective are:

> This patient attended and successfully participated in the 60 minute "Tinnitus Management" class providing education in characteristics and causes of Tinnitus, exacerbating and mitigating factors and strategies which have been or can be employed to minimize its effects on the individual. Completion of a questionnaire and a scaling instrument was included in the class to give the Audiologist insight into specific areas for focus in follow-up individual treatment.

And

> SUMMARY OF FIRM BACKS WORKSHOP:
> Pt attended and participated in the FIRM BACKS workshop provided through Behavioral Medicine. Pt learned about chronic lower back pain behavioral principles to self-manage chronic lower back pain. The pt was provided exercises (abdominal and back strengthening, walking) and was able to demonstrate these exercises correctly. Pt was helped to develop an individualized plan for initiating and maintaining an exercise program.
> PLAN:
> 1. Pt will be followed up by phone per workshop protocol (2 weeks, 3 months, and 6 months).
> 2. Pt's Primary Care Provider will be apprised of pt's participation and progress.
> 3. It is recommended that the PCP inquire about the pt's progress in maintaining the exercise program and providing feedback (praise, encouragement) as appropriate.

You may use the Edit Document Definitions screen in the Detailed Display/Edit mode to add or edit boilerplate in a title.

Workstation Setup

Any workstation already configured for CPRS will run Group Notes. Thus the requirements for making a terminal usable for Group Notes are:

1. Make sure the VistA Broker is present on the machine.
2. Make sure a properly configured HOSTS file is present on the machine.
3. Copy the Group Notes executable (GroupNotes.exe) and the Group Notes help file (CPRSGN.HLP) to the machine's hard drive or to a server permanently connected to the machine.
4. Create a shortcut for GroupNotes.exe. Alternatively you may add Group Notes to the Tools menu of CPRS.

Glossary

ADPAC		Automated Data Processing Application Coordinator. A VistA software expert who usually works for IRMS.
Boilerplate		A pre-defined TIU template that can be filled in for Titles, speeding up the text entry process. TIU exports several Titles with boilerplate text which can be modified to meet specific needs; sites can also create their own.
		For Group Notes a title with information that would be common for each member of the group works well. Any TIU objects used in boilerplate are filled in as if for the first patient, so avoid objects in Group Notes boilerplate.
CAC		Clinical Application Coordinator. A software specialist who usually works for one of the medical center services.
CPRS		Computerized Patient Record System. A front-end program that attempts to provide all VistA functionality in a Windows interface. Currently CPRS is being re-written to work in any windowing system that supports a web browser. This will allow users to access VistA from UNIX and Macintosh based systems. The target date for release of this advanced system is third quarter 2005.
IRMS		Information Resource Management Service.
TIU		Text Integration Utilities. An umbrella package with the purpose of combining all clinical note processing into a single entity. In CPRS, TIU is represented by the Notes tab.
VDL		VistA Document Library. A service of the Department of Veterans Affairs to provide documentation to all users. Anyone can access the VDL at web address: www.va.gov/vdl/

Index