QA/QM Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Determine what VistA QM applications you will be using. Use the option, QM Packages Inquire, located under the QM Manager Menu to review the list of the VistA QM software.			
2. On the QM Manager Menu, use the Combined Site Parameters Edit option to edit as needed.			
3. The QM Manager Menu contains all the options to establish the required set-up for these applications. A. Occurrence Screen Manager Menu			
B. Incident Reporting Managers Menu (see separate spreadsheet)			
C. Monitoring System Manager Menu			
4. Occurrence Screening: A. Using the Package Setup Option on the Occurrence Screen Manager Menu to set up parameters, mailgroups, etc.			
B. You need at least one dedicated (80 column) printer for your use, or one for each division if you are a multi-division site			
C. The Statistical Review Summary report uses 132 columns. Refer to the User Manual for an example of the output. If this is a report you can use, check with IRM about available printers.			
D. Obtain a list of those users who are Clinical Reviewers			
E. Discuss with the QM staff any types of occurrences they would like to track using this software that are not national screens. Review the chapters in the User Manual on VAMC-Specific Screens and Reasons for Clinical			

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Referral.			
F. Compile a list of all the retired national screens that the QM staff wants to continue using (i.e., those marked as LOCAL).			
G. If medical teams are used at your site, does the QM staff wish to include medical teams in the Occurrence Screen software? If used, occurrences can be attributed to medical teams.			
H. Committees are used in this software to review system and/or equipment problems. Obtain a list of committees that your site wants to use for referrals of these types of occurrences.			
I. Before using the software, you **must complete 1, 2, and 3** listed here or the software will not work. Using the Package Setup Menu: 1) Populate the Site Parameters option. 2) Populate the Clinical Reviewers option. 3) Assign a care type to all the treating specialties used at your site through the Treating Specialty Care Types option. 4) Populate the Committees option and the Medical Teams option if you intend to use them. Populate the VAMC-Specific Screens option and the Reasons for Clinical Referral option if you want to set up screens not exported with the software. 5) The installation of Occurrence Screen Version 3.0 will mark <u>all</u> retired national screens as INACTIVE. Consult list compiled under Step above for those to be marked as LOCAL			
J. Within the User Manual, review the Site Parameters			

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option for any new information you will need, specifically: 1) Do you want to allow multiple patient selections when exercising some of the options? This is fully described in the Orientation Section of the User Manual. 2) Is the Surgery software installed and being used at your site? If it is, you will be able to auto enroll screen 107, Returns to OR. 3) Do you use one or more clinics to schedule admissions? You will want to enter the names of these clinics into the site parameters. 4) If you are a multi-divisional site, you can now enter each division into the site parameters along with a printer name for each division.			
K. Check with IRM to make sure they have queued the Tasked Run of Auto Enroll option so that it will run every night after midnight			

L. Site parameters
 1) *Day Weekly Time Frame Begins*
   a) This is the day of the week that should begin each weekly time frame. Generally, this would be Sunday but could be Monday since that is considered a regular work day.
 2) *Monitoring System Device*
   a) The device on which auto enroll reports will print.
 3) *Max Days Per Manual Auto Run*
   a) This field contains the maximum number of auto enroll runs that may be run consecutively. A date range of more than three days is allowed;			

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however, the Clinical Monitoring System will break the job up into several tasks, each spanning three days. Note that if this field is set to too small a number and the user runs auto enroll over a large number of days, a large number of tasks will be created.			
4) *Time Between Manual Auto Runs* a) This field contains the number of minutes between queued runs of auto enroll. This, together with the MAX DAYS limit above, is used to tightly control the use of computer resources that auto enroll processing uses.			
5) *Manual Auto Run Allowed Times* a) This field contains the range of time during which auto enroll may be manually queued to run. The format is HHMM-HHMM (where hh = hours and mm = minutes). The second time must be greater than the first.			
6) *Allow Use of '[' in Group Edit* a) Allows use of the "contains" operator ([ ) in the group edit. If this field is set to YES, the user may enter "[GROUP MEMBER" during group edit to select all entries that contain the text "GROUP MEMBER" as part of their name. Building groups using the "contains" operator is computer intensive.			
5. Examples of JCAHO monitors at shown in Appendix A of the ADPAC guide			