

PIMS V. 5.3 Scheduling Module User Manual update

The manual is broken down into the following PDF files.

- **Menus, Intro, Orientation, etc.**
- **Ambulatory Care Reporting Menu**
- **Appointment Menu**
- **Automated Service Connected Designation Menu**
- **Outputs Menu**
- **Supervisor Menu**

Revision History

Initiated on 02/22/07

Date	Description (Patch # if applic.)	Project Manager	Technical Writer
2/22/07	SD*5.3*466 - Ambulatory Care, Phase II enhancements	Zach Fain	Corinne Bailey
3/7/07	Removed PCMM Reports Menu Documentation – PCMM now listed separately in the VistA Documentation Library	Michael Mahoney	Corinne Bailey
11/7/07	Removed Transitional Pharmacy Benefit Deferred Appt Record option from Outputs Menu		Corinne Bailey
11/9/07	Added Automated Service Connected Designation Menu to the Scheduling menu and referred users to the ASCD site in the VistA Documentation Library	Zach Fain	Corinne Bailey
7/1/08	DG*5.3*779 - Added New Enrollee Appointment Request Management Menu to the Appointment Menu	Richard Muller	Corinne Bailey
1/29/09	Name change update - Austin Automation Center (AAC) to Austin Information Technology Center (AITC)	Kevin Jackson	Tavia Leonard
10/25/10	SD*5.3*568 – Added two new options to the SDSUP Menu: “Edit Clinic Stop Code Name- Local Entries Only” option and the “Clinic Edit Log Report” option.	John Mahan	Tavia Leonard

- **Menus, Intro, Orientation, etc.**

Menus

Introduction

Orientation

- How to Use this Manual

- On-line Help

- Notice to Users with “QUME” Terminals

ACRP Database Conversion Option

Glossary

- Military Time Conversion Table

Option Index

- **Ambulatory Care Reporting Menu**

Overview

ACRP Reports Menu

ACRP Ad Hoc Report Menu

ACRP Ad Hoc Report

Delete an Ad Hoc Report Template

Display Ad Hoc Report Template Parameters

Print from Ad Hoc Template

Clinic Appointment Availability Report

Clinic Group Maintenance for Reports

Clinic Utilization Statistical Summary

Data Validation Menu

Enc. by IP DSS ID/DSS ID by Freq. (IP0, IP1, IP2)

Means Test IP Visits & Unique (IP3, IP4, IP5)

Most Frequent 50 IP CPT Codes (IP6)

Most Frequent 50 IP ICD-9-CM Codes (IP7)

Most Frequent 20 IP Practitioner Types (IP8)

Visits and Unique IP SSNs by County (IP9)

Enc. by DSS ID/DSS ID by Freq. (OP0, OP1, OP2)

Means Test Visits & Uniques (OP3, OP4, OP5)

Most Frequent 50 CPT Codes (OP6)

Most Frequent 50 ICD-9-CM Codes (OP7)

Most Frequent 20 Practitioner Types (OP8)

Visits and Unique SSNs by County (OP9)

Encounter Activity Report

Encounter 'Action Required' Report

Means Test/Eligibility/Enrollment Report

Outpatient Diagnosis/Procedure Frequency Report

Outpatient Diagnosis/Procedure Code Search

Outpatient Encounter Workload Statistics

Patient Activity by Appointment Frequency

Patient Appointment Statistics

Patient Encounter List

Performance Monitor Menu

Performance Monitor Summary Report

Performance Monitor Detailed Report

Performance Monitor Retransmit Report (AAC)

Review of Scheduling/PCE/Problem List Data

Retroactive Visits List

SC Veterans Awaiting Appointments

Trend of Facility Unique by 12 Month Date Ranges

Veterans Without Activity Since a Specified Date

Error Listing

- **Ambulatory Care Reporting Menu, cont.**

Transmission Reports

- Transmission History Report - Full

- Transmission History for Patient

Supervisor Ambulatory Care Menu

- Edit Appointment Type for Add/Edit Encounters

- Check Transmitted Outpatient Encounter Files

- Purge Ambulatory Care Reporting files

- Scheduling/PCE Bad Pointer Count

- Edit Outpatient Encounter

- Purge rejections that are past database close-out

Data Transmission Report

Incomplete Encounter Management

- Incomplete Encounter Reports

- Alpha List of Incomplete Encounters

- Encounters Transmitted with MT Status of U

- Incomplete Encounter Error Report

- Incomplete Encounters by Error Code

- Summary Report - IEMM

- Correct Incomplete Encounters

Retransmit Ambulatory Care Data by Date Range

Retransmit Selected Error Code

Selective Retransmission of NPCDB Rejections

- **Appointment Menu**

Overview

Appointment Management

Appointment Check-in/Check-out

Add/Edit Stop Codes

Append Ancillary Test to Appt.

Cancel Appointment

Chart Request

Check-in/Unsched. Visit

Computer Generated Menu

- Computer Generated Appointment Type Listing

- Edit Computer Generated Appointment Type

- Batch Update Comp Gen Appt Type for C&Ps

- Stop Code Listing (Computer Generated)

Delete Ancillary Test for Appt.

Discharge from Clinic

Display Appointments

Edit Clinic Enrollment Data

Enrollment Review Date Entry

Find Next Available Appointment

Make Appointment

Make Consult Appointment

Multiple Appointment Booking

New Enrollee Appointment Request Management Menu

- Management Edit

- Call List

- Tracking Report

Multiple Clinic Display/Book

No-Shows

Team/Position Assignment/Re-Assignment

- **Automated Service Connected Designation Menu**

Documentation for this module may be found in the VistA Documentation Library under Automated Service Connected Designation at the following address.

<http://www.va.gov/vdl/application.asp?appid=174>

- **Outputs Menu**

Overview

Appointment List

Appointment Management Report

Cancelled Clinic Report

Clinic Assignment Listing

Clinic List (Day of Week)

Clinic Next Available Appt. Monitoring Report

Clinic Profile

Display Clinic Availability Report

Enrollments > X Days

File Room List

Future Appointments for Inpatients

Inpatient Appointment List

Management Report for Ambulatory Procedures

No-Show Report

Patient Profile MAS

PCMM Main Menu

Print Scheduling Letters

Provider/Diagnosis Report

Radiology Pull List

Routing Slips

Visit Rpt by Transmitted OPT Encounter

Workload Report

- **Supervisor Menu**

Overview

Add/Edit a Holiday

Appointment Status Update Menu

- Appointment Status Update

- Print Appointment Status Update (Date Range)

- Purge Appointment Status Update Log File

- View Appointment Status Update Date (Single Date)

Appointment Waiting Time Report

Cancel Clinic Availability

Change Patterns to 30-60

Clinic Edit Log Report

Convert Patient File Fields to PCMM

Current MAS Release Notes

Edit Clinic Stop Code Name - Local Entries Only

Enter/Edit Letters

Inactivate a Clinic

Look Up on Clerk Who Made Appointment

Non-Conforming Clinics Stop Code Report

Purge Scheduling Data

Reactivate a Clinic

Remap Clinic

Restore Clinic Availability

Scheduling Parameters

Set up a Clinic

Sharing Agreement Category Update

Introduction

The PIMS User Manual is divided into two modules, ADT and Scheduling. This is the Scheduling module of PIMS.

The Scheduling module of the PIMS Package is designed to assist in the set-up of clinics, scheduling of patients for clinic appointments, and the collection of an assortment of related workload data for reporting purposes. Through Scheduling, necessary National Patient Care Database (NPCDB) workload is transparently collected and may be transmitted to the Austin Information Technology Center (AITC), (formerly the Austin Automation Center (AAC)).

The information gathered through Scheduling is available on-line to a wide range of users throughout the medical center. Scheduling is fully integrated with the VA FileMan, thus allowing the extraction of ad hoc reports by non-programming personnel.

The Scheduling software provides for efficient and accurate collection, maintenance and output of data, thus enhancing your medical center's ability to provide quality care to its patients.

Important features of the Scheduling module include clinic set-up and enrollment/discharge of patients from clinics. Some of the outputs which may be generated include workload analysis reports and letters of notification regarding cancellation of clinics/appointments.

The PIMS software package makes use of Current Procedural Terminology (CPT) codes which is an AMA copyrighted product. Its use is governed by the terms of the agreement between the Department of Veterans Affairs and the American Medical Association.

Other related materials are the PIMS Technical Manual, the PIMS Installation Guide, and the PIMS Release Notes. The PIMS Technical Manual is provided to assist IRM personnel in maintenance of the software. The Installation Guide provides assistance in installation of the package, and the Release Notes describe any modifications and enhancements to the software that are new to the version.

NOTE:

MAS is an acronym for Medical Administration Service. This service, where it still exists, is now generally referred to as Health Administration Service. Several file names, option names, and reports in the PIMS software contain the initials MAS. These will be retained to avoid confusion and ensure continuity.

Orientation

How to Use this Manual

The Scheduling User Manual is provided in Adobe Acrobat PDF (portable document format) files. The Acrobat Reader is used to view the documents. If you do not have the Acrobat Reader loaded, it is available from the **VISTA** Home Page, “Viewers” Directory.

Once you open the file, you may click on the desired entry name in the table of contents on the left side of the screen to go to that entry in the document. You may print any or all pages of the file. Click on the “Print” icon and select the desired pages. Then click “OK”.

Each menu file contains a listing of the menu, a brief description of the options contained therein, and the actual option documentation. The option documentation gives a detailed description of the option and what it is used for. It contains any special instructions related to the option.

Orientation

On-line Help

When the format of a response is specific, there usually is a HELP message provided for that prompt. HELP messages provide lists of acceptable responses or format requirements which provide instruction on how to respond.

A HELP message can be requested by typing a "?" or "??". The HELP message will appear under the prompt, then the prompt will be repeated. For example, perhaps you see the prompt

Sort by TREATING SPECIALTY:

and you need assistance answering. You enter "?" and the HELP message would appear.

Sort by TREATING SPECIALTY: ?

CHOOSE FROM:

.01 SURGERY

1 CARDIOLOGY

12 PSYCHIATRY

Sort by TREATING SPECIALTY:

For some prompts, the system will list the possible answers from which you may choose. Any time choices appear with numbers, the system will usually accept the number or the name.

A HELP message may not be available for every prompt. If you enter a "?" or "?? at a prompt that does not have a HELP message, the system will repeat the prompt.

Orientation

Note to Users with "QUME" Terminals

It is very important that you set up your Qume terminal properly. After entering your access and verify codes, you will see:

Select TERMINAL TYPE NAME: {type}//

Please make sure that C-QUME is entered here. Once you enter this, it will become the default and you can then enter <RET> for all subsequent log-ins. If any other terminal type configuration is set, options using the List Manager utility (such as Appointment Management and Scheduling Parameters) will neither display nor function properly on your terminal.

ACRP Database Conversion

This option has been exported as a stand-alone option to be run by IRM in consultation with the Scheduling Supervisor **or** assigned to the Scheduling Supervisor to be run in consultation with IRM.

The purpose of the database conversion is to convert old Scheduling encounter information into the Visit Tracking/Patient Care Encounter (PCE) database. Scheduling encounters include appointments, add/edits, and dispositions. All data from 10/1/96 on is already part of the PCE database and does not need to be converted. This one option provides the functionality necessary to accomplish all aspects of the database conversion.

The conversion is accomplished by creating Conversion Specification Templates (CSTs). They contain the user-specified criteria that defines a set of records (based on a time frame) to be converted from the current file structure to the new file structure. The CST also maintains an error log and an event log for conversion-process tracking.

There are 3 functions (or events) relating to the CST.

Estimate - Determines amount of disk space the conversion will take. Estimating is not mandatory. Once you've started the conversion, you cannot go back and estimate.

Convert - Actually converts the data into PCE files.

Cancel - Once canceled, no further action can be taken against a CST. However, another CST can be created that includes the same time frame.

Once the event has started, the actions shown on the CST Master List screen will go from "queued" to "started" to "completed" without user intervention. If the task never starts, contact IRM Service to find out why.

The templates listed on the CST Master List are in date range order. When one is added, it will be placed on the list in date order. The asterisk (*) before a date range indicates there is a gap between that date range and the entry preceding it.

ACRP Database Conversion

Parameters

The following ACRP Database Conversion parameters are set through the Display/Edit Parameters action.

EARLIEST ENCOUNTER DATE

This field contains the earliest allowable date to convert encounters (cannot be before 10/1/80). For example, if 1/1/86 is entered in this field, encounters before 1/1/86 cannot be converted via the encounter conversion utilities. Additionally, all data from this date through 9/30/96 must be converted before the database conversion at your site can be designated as complete.

LIMIT CONV RANGE TO 1 YEAR: NO// (0 or NO; 1 or YES)

Set this field to YES if you wish to limit the Scheduling conversion date range for a CST to a maximum of 1 year.

DEFAULT DISPOSITION CLINIC

If a valid disposition clinic cannot be determined for the division, this field contains the pointer to the disposition clinic that will be used for the conversion of dispositions.

MAXIMUM ERRORS ALLOWED: 1000//

If a CST produces this number of errors in the CST Error Log, processing of the conversion for the template will be stopped. If this field contains no value, the system will use 1000.

DISPLAY CANCELLED TEMPLATES: NO// (0 or NO; 1 or YES)

This parameter determines whether or not cancelled CSTs are included in the list of templates displayed while using the ACRP Database Conversion option.

DATE CONVERSION COMPLETED (date)

This is the date the entire conversion has been completed at your site. After this date has been entered, no more CSTs can be run. You will only be allowed to make an entry at this parameter when all CSTs are either completed or canceled and when the date range from the earliest encounter date through 9/30/96 has completed conversion.

ACRP Database Conversion

DATE DELETION COMPLETED (date)

This is the date the last of the following files were deleted from the system.

- OPC (#40.1)
- OPC ERRORS (#40.15)
- SCHEDULING VISITS (#409.5)
- OUTPATIENT DIAGNOSIS (#409.43)
- OUTPATIENT PROVIDER (#409.44)

Once this date has been entered, the Scheduling software will no longer check these files for visit data. It will only use the PCE V-files. You will only be allowed to make an entry at this parameter when all CSTs are either completed or canceled.

Actions Available from the CST Master List Screen

Add Template

Used to create a CST. You cannot select a CST start date before 9/1/80. After creating a CST, you can initiate the estimate or convert event. Both events can generate a bulletin when completed - the Scheduling Conversion Global Growth bulletin for the estimate event and the Scheduling Conversion Log bulletin for the convert event. You should answer YES to the "Bulletin Upon Completion" prompt if you wish to be notified when the event has completed.

Edit Template

Used to perform the following: edit whether or not the bulletin is generated; edit date range when estimating; change event to convert after estimating. Can't edit CST dates once conversion is started.

Schedule/Stop Event

Start, restart, or stop the current conversion event through this action.

Cancel Template

Used to cancel a CST. You may wish to cancel if estimating showed the selected date range as too large. Once the selected date range has completed converting, the CST cannot be canceled. Even though a CST has been canceled, another CST may be created for the same time frame.

ACRP Database Conversion

View Template

May display conversion data such as template date range, estimate results, last event, last action request, and estimated global growth.

Mail Estimate Bulletin

Used to get a copy of the estimate bulletin without rerunning the estimate. Goes to the user and whoever has made a request to schedule/stop the event.

Refresh List

Used to refresh the screen and update the list with the most recent event status.

Estimate Summary

Used to obtain a copy of the estimate summary. Categories include global block growth, new entries, modified entries, and global block estimates per entry. You may print the summary to include each CST individually (answer YES to CST detail). This summary should be used by IRM to help plan disk space requirements.

Display/Edit Parameters

Used to enter/edit the database conversion parameters. Some of these include setting the earliest allowable date to convert encounters and limiting the conversion range to one year.

Convert Single Visit

Used to convert a single visit. The visit may be selected from available records by encounter, disposition, appointment, or standalone add/edit. Identifying information will be displayed for each selection to ensure you have selected the correct visit.

Delete Old Files

Once you have converted all the data, you may wish to delete the old Scheduling files. A list of the files which may be deleted will be displayed when selecting this action. It is recommended you back up these files before deletion. All data from your "earliest date to convert" to 9/30/96 must be converted (with no gaps) before these files can be deleted.

ACRP Database Conversion

Actions Available from the CST Detail Screen

The CST Detail Screen is reached by utilizing the View Template action on the CST Master List Screen. No template selection is necessary for these actions as the template has already been selected.

Edit Template

Same as on the CST Master List screen.

Schedule/Stop Event

Same as on the CST Master List screen.

Cancel Template

Same as on the CST Master List screen.

Action Request Log

Prints a list of requests taken against the CST. Includes request date/time, action, event, start date/time, stop date/time (will only appear if an entry was made at the stop date/time prompt), and user.

Error Log

Prints a list of errors for a selected CST. Includes error code number and error text.

Event Log

Prints a list of events for a selected CST. Includes event date/time, status, and event.

Mail Estimate Bulletin

Same as on the CST Master List screen.

Glossary

add-ons	Patients who have been scheduled for a visit after routing slips for a particular date has been printed.
AMIS	Automated Management Information System
ancillary test	A test added to an existing appointment (i.e. lab, x-ray, EKG).
collateral visit	A visit by a non-veteran patient whose appointment is related to or associated with a service-connected patient's treatment.
CPT	Current Procedural Terminology
no show	A person who did not report for a scheduled clinic visit without prior notification to the medical center.
non-count clinic	A clinic whose visits do not affect AMIS statistics.
pull list	A list of patients whose radiology/MAS records should be pulled from the file room for use in conjunction with scheduled clinic visits.
RAM	Resource Allocation Methodology
routing slip	When printed for a specified date, it shows the current appointment time, clinic, location, and stop code. It also shows future appointments.
security key	Used in conjunction with locked options or functions. Only holders of this key may perform these options/functions. Used for options which perform a sensitive task.
sharing agreement	Agreement or contract under which patients from other government agencies or private facilities are treated.
stop code	A three-digit number corresponding to an additional stop/service a patient received in conjunction with a clinic visit. Stop code entries are used so that medical facilities may receive credit for the services rendered during a patient visit.

Glossary

Military Time Conversion Table

STANDARD	MILITARY
12:00 MIDNIGHT	2400 HOURS
11:00 PM	2300 HOURS
10:00 PM	2200 HOURS
9:00 PM	2100 HOURS
8:00 PM	2000 HOURS
7:00 PM	1900 HOURS
6:00 PM	1800 HOURS
5:00 PM	1700 HOURS
4:00 PM	1600 HOURS
3:00 PM	1500 HOURS
2:00 PM	1400 HOURS
1:00 PM	1300 HOURS
12:00 NOON	1200 HOURS
11:00 AM	1100 HOURS
10:00 AM	1000 HOURS
9:00 AM	0900 HOURS
8:00 AM	0800 HOURS
7:00 AM	0700 HOURS
6:00 AM	0600 HOURS
5:00 AM	0500 HOURS
4:00 AM	0400 HOURS
3:00 AM	0300 HOURS
2:00 AM	0200 HOURS
1:00 AM	0100 HOURS

Option Index

ACRP Ad Hoc Report
ACRP Database Conversion
Alpha List of Incomplete Encounters
Add/Edit Stop Codes
Add/Edit a Holiday
Append Ancillary Test to Appt.
Appointment Check-in/Check-out
Appointment List
Appointment Management
Appointment Management Report
Appointment Status Update
Appointment Waiting Time Report

Batch Update Comp Gen Appt Type for C&Ps

Call List
Cancel Appointment
Cancel Clinic Availability
Cancelled Clinic Report
Change Patterns to 30-60
Chart Request
Check Transmitted Outpatient Encounter Files
Check-in/Unsched. Visit
Clinic Appointment Availability Report
Clinic Assignment Listing
Clinic Edit Log Report
Clinic Group Maintenance for Reports
Clinic List (Day of Week)
Clinic Next Available Appt. Monitoring Report
Clinic Profile
Clinic Utilization Statistical Summary
Computer Generated Appointment Type Listing
Convert Patient File Fields to PCMM
Correct Incomplete Encounters
Current MAS Release Notes

Option Index

Data Transmission Report
Delete an Ad Hoc Report Template
Delete Ancillary Test for Appt.
Discharge from Clinic
Display Ad Hoc Report Template Parameters
Display Appointments
Display Clinic Availability Report

Edit Appointment Type for Add/Edit Encounters
Edit Clinic Enrollment Data
Edit Clinic Stop Code Name- Local Entries Only
Edit Computer Generated Appointment Type
Edit Outpatient Encounter
Enc. by DSS ID/DSS ID by Freq. (OP0, OP1, OP2)
Enc. by IP DSS ID/DSS ID by Freq. (IP0, IP1, IP2)
Encounter Activity Report
Encounter 'Action Required' Report
Encounters Transmitted with MT Status of U
Enrollment Review Date Entry
Enrollments > X Days
Enter/Edit Letters
Error Listing

File Room List
Find Next Available Appointment
Future Appointments for Inpatients

Inactivate a Clinic
Incomplete Encounter Error Report
Incomplete Encounters by Error Code
Inpatient Appointment List

Look Up on Clerk Who Made Appointment

Option Index

Make Appointment
Make Consult Appointment
Management Edit
Management Report for Ambulatory Procedures
Means Test/Eligibility/Enrollment Report
Means Test IP Visits & Unique (IP3, IP4, IP5)
Means Test Visits & Uniques (OP3, OP4, OP5)
Most Frequent 20 IP Practitioner Types (IP8)
Most Frequent 50 CPT Codes (OP6)
Most Frequent 50 ICD-9-CM Codes (OP7)
Most Frequent 50 IP CPT Codes (IP6)
Most Frequent 50 IP ICD-9-CM Codes (IP7)
Most Frequent 20 Practitioner Types (OP8)
Multiple Appointment Booking
Multiple Clinic Display/Book

Non-Conforming Clinics Stop Code Report
No-Show Report
No-Shows

Outpatient Diagnosis/Procedure Code Search
Outpatient Diagnosis/Procedure Frequency Report
Outpatient Encounter Workload Statistics

Option Index

Patient Activity by Appointment Frequency
Patient Appointment Statistics
Patient Encounter List
Patient Profile MAS
Performance Monitor Detailed Report
Performance Monitor Retransmit Report (AAC)
Performance Monitor Summary Report
Print Appointment Status Update (Date Range)
Print from Ad Hoc Template
Print Scheduling Letters
Provider/Diagnosis Report
Purge Ambulatory Care Reporting files
Purge Appointment Status Update Log File
Purge rejections that are past database close-out
Purge Scheduling Data

Radiology Pull List
Reactivate a Clinic
Remap Clinic
Restore Clinic Availability
Retransmit Ambulatory Care Data by Date Range
Retransmit Selected Error Code
Retroactive Visits List
Review of Scheduling/PCE/Problem List Data
Routing Slips

SC Veterans Awaiting Appointments
Scheduling Parameters
Scheduling/PCE Bad Pointer Count
Selective Retransmission of NPCDB Rejections
Set up a Clinic
Sharing Agreement Category Update
Stop Code Listing (Computer Generated)
Summary Report - IEMM

Option Index

Team/Position Assignment/Re-Assignment

Tracking Report

Transmission History for Patient

Transmission History Report - Full

Trend of Facility Uniques by 12 Month Date Ranges

Veterans Without Activity Since a Specified Date

View Appointment Status Update Date (Single Date)

Visit Rpt by Transmitted OPT Encounter

Visits and Unique IP SSNs by County (IP9)

Visits and Unique SSNs by County (OP9)

Workload Report