Department of Veterans Affairs

Office of Information & Technology (OIT) Product Development

Mental Health Clinical Reminder Dialog Templates



Installation Guide

Patch PXRM*2.0*32

November 2014 Version 1.3

Revision History

Date	Version	Description	Author
August 2014	1.3	Backup instructions added	Information Innovators Inc.
August 2013	1.2	Increment 3 – Patch PXRM*2.0*32	Information Innovators Inc.
January 2013	1.0	Increments 1 & 2 – Patch PXRM*2.0*29	Information Innovators Inc.

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1. Introduction

This document describes the installation and setup for the national release of Mental Health Clinical Reminder (MHCR) Dialog Templates, Patch PXRM*2.0*32. Clinicians will use these templates to document mental health treatment using specified Evidence Based Psychotherapy (EBP) protocols, as requested by Mental Health Services (MHS).

Patch PXRM*2.0*32 contains reminder dialog templates in support of five EBP protocols. The templates will be accessed by mental health clinicians documenting therapy sessions through the CPRS Shared Template Drawer. There is no reminder definition, so no reminder logic is being used.

1.1. Target audience

The intended user is familiar with the VistA computing environment (Kernel Installation and Distribution System [KIDS]).

1.2.MHCR dialog titles for Patch PXRM*2.0*32

On the next page, a tablelists the MHCR dialog titles for Patch PXRM*2.0*32 and the associated mandated template names for the configuration of these templates in the Shared Template drawer. This step is required to facilitate clinician recognition of the correct templates, and this naming convention will be used in national provider training. The national EBP training programs have created clinician training materials based on the this naming convention, therefore the names, the order of those names, and the names of their enclosing folders should be followed – see note on page 14 (section 3.3.3).

Reminder Dialog Title	Mandated Template Drawer Name	
IPT - Interpersonal Psychotherapy for Depression		
VA-MH IPT 1 DEPRESSION	IPT 1 Depression Initial	
VA-MH IPT 2 DEPRESSION	IPT 2 Depression Intermediate	
VA-MH IPT 3 DEPRESSION	IPT 3 Depression Termination	
VA-MH IPT 4 DEPRESSION MAINT	IPT 4 Depression Maintenance	
VA-MH IPT EARLY TERMINATION	IPT Early Termination	
CBT-I - Cognitive Behavioral Therapy for Insomnia*		
VA-MH CBT-I 1 EVALUATION SESSION	CBT-I: 1 Evaluation Session	
VA-MH CBT-I 2 INITIAL TREATMENT PHASE	CBT-I: 2 Initial Treatment Phase	
VA-MH CBT-I 3 MIDDLE TREATMENT PHASE	CBT-I: 3 Middle Treatment Phase	
VA-MH CBT-I 4 FINAL SESSION	CBT-I: 4 Final Session	
VA-MH CBT-I EARLY TERMINATION	CBT-I: Early Termination	
BFT - Behavioral Family Therapy		
VA-MH BFT 1 ORIENTATION	BFT 1 Orientation Session	
VA-MH BFT 2 EDUCATION SESSION	BFT 2 Education Session	
VA-MH BFT 3 COMMUNICATION SESSION	BFT 3 Communication Session	
VA-MH BFT 4 PROBLEM-SOLVING SESSION	BFT 4 Problem-Solving Session	
VA-MH BFT 5 FINAL SESSION	BFT 5 Final Session	
VA-MH BFT 6 EARLY TERMINATION	BFT Early Termination	
SST - Social Skills Training		
VA-MH SST 1 INITIAL	SST 1 Initial	
VA-MH SST 2 GROUP VISIT	SST 2 Group Visit	
VA-MH SST 3 FINAL VISIT	SST 3 Final Visit	
VA-MH SST EARLY TERMINATION	SST Early Termination	
IBCT - Integrative Behavioral Couple Therapy		
VA-MH IBCT 1 INITIAL	IBCT 1 Initial	
VA-MH IBCT 2 INDIVIDUAL	IBCT 2 Individual	
VA-MH IBCT 3 NON VETERAN	IBCT 3 Non Veteran	
VA-MH IBCT 4 FEEDBACK	IBCT 4 Feedback	
VA-MH IBCT 5 THERAPY	IBCT 5 Therapy	
VA-MH IBCT 6 TERMINATION	IBCT 6 Termination	
VA-MH IBCT EARLY TERMINATION	IBCT Early Termination	

^{*}NOTE: The semicolon is needed on the CBT-I template names so that the I is not confused with a 1 (e.g. CBT-I: 1 Evaluation Session vs. CBT-I 1 Evaluation Session)

1.3. Project references

Manuals & Guides	Documentation File name/ Web address
Clinical Reminders User Manual	PXRM_2_20_UM.PDF
Clinical Reminders Manager's Manual	PXRM_2_MM.PDF
CPRS Technical Manual	http://www.va.gov/vdl/documents/Clinical/Comp_Patient_Recrd_Sys_(CPRS)/cprsImtm.pdf
CPRS User Guide: GUI Version	http://www.va.gov/vdl/documents/Clinical/Comp_Patient_Recrd_Sys_(CPRS)/cprsguium.pdf
Health Summary Technical Manual	http://www.va.gov/vdl/documents/Clinical/CPRS-Health_Summary/hsum2_7_tm.pdf
VistA MHA 3 Installation	http://www.va.gov/vdl/application.asp?appid=78
Guide	
PATCH YS*5.01*105	

Web Sites	URL	Description
National Clinical Reminders site	http://vista.med.va.gov/reminders	Contains manuals, PowerPoint presentations, and other information about Clinical Reminders.
National Clinical Reminders Committee	http://vaww.portal.va.gov/sites/ncrc public/default.aspx	This committee directs the development of new and revised national reminders.
VistA Documentation Library	http://www.va.gov/vdl/	Contains manuals for Clinical Reminders and CPRS.

1.4. Acronyms and definitions

Acronyms	Definition			
ASU	Authorization/Subscription Utility			
CAC	Clinical Application Coordinator			
Clin4	National Customer Support team that supports Clinical Reminders			
CPRS	Computerized Patient Record System			
GMTS	Health Summary namespace (also HSUM)			
GUI	Graphic User Interface			
ICD-9	International Classification of Diseases, 9th Edition			
MHCR	Mental Health Clinical Reminder			

MHS	Mental Health Services (previously OMHS)
MHTC	Mental Health Treatment Coordinator
ОНІ	Office of Health Information
OI	Office of Information
OIT/OI&T	Office of Information Technology
OMHS	Office of Mental Health Services (now MHS)
PTM	Patch Tracker Message
PXRM	Clinical Reminder Package Namespace

1.5. Section 508 compliance

The Veterans Health Administration (VHA) fully supports Section 508 of *The Rehabilitation Act* and is committed to equal access for all users. The MHCR dialog templates project was evaluated according to parameters. Because the templates are a minor addition to VistA CPRS and use VistA tools, Section 508 compliance was determined to be N/A.

2. Pre-Installation

2.1.Installation system notes and requirements

• VistA Operating System

Mental Health Clinical Reminders Dialog Templates – PXRM*2.0*32 patch, as well as CPRS, and MHA currently run on the standard hardware platforms used by the Department of Veterans Affairs Health Care System facilities. These systems consist of standard or upgraded Alpha AXP clusters, and run either Cache-VMS or Cache-NT and the Open M product.

MHCR Software Application Installation Time

MHCR Patch PXRM*2.0*32 installation time takes approximately 10-15 minutes during off peak hours.

Users on the System

Users may remain on the system. However, the installation should be done during off-peak hours.

• Kernel Installation and Distribution System (KIDS)

PXRM*2.0*32 is created using the Kernel Installation and Distribution System (KIDS). For further instructions on using KIDS, please refer to the Kernel V.8.0 Systems Manual.

Namespace

Mental Health Clinical Reminder Patch PXRM*2.0*32 namespace is PXRM.

2.2.Software retrieval

Your site will receive the Mental Health Clinical Reminders Dialog Template files as part of patch PXRM*2.0*32 via a host file. The preferred method is to FTP the files from:

download.vista.med.va.gov

This location automatically transmits files from the first available FTP Server to the appropriate directory on your system. (See the order listed below under the FTP Address column). If you prefer, you can retrieve the software *directly* from one of the FTP Servers listed below, under the FTP Address column.

OI Field Office	FTP Address	Directory
Albany (NY)	ftp.fo-albany.med.va.gov	anonymous.software
Hines (IL)	ftp.fo-hines.med.va.gov	anonymous.software
Salt Lake City (UT)	ftp.fo-slc.med.va.gov	anonymous.software

2.3. Security management

There are no unique legal requirements pertaining

2.4. Backup routines

No routines are being installed by this content-only patch, however, we recommend performing a backup of the transport global before installing the VistA MHCR Dialog Templates Patch PXRM*2.0*32.

The option called Backup a Transport Global [XPD BACKUP] creates a MailMan message that backs up all current routines on your system that would be replaced by a KIDS patch. This option is under the Installation menu of the KIDS menu. It works on a patch that has been loaded on your system, but not installed.

Example of the option "Backup a Transport Global:"

Select Installation Option: B <ENTER> ckup a Transport Global

Select INSTALL NAME: PXRM*2.0*32 Loaded from Distribution 10/30/13@16:25 => Initial MH reminders ;Created on

This Distribution was loaded on Oct 30, 2013@16:25

with header of Initial MH reminders ;Created on Oct 30, 2013@16:25 It consisted of the

following Install(s): PXRM*2.0*32

Subject: Backup of PXRM*2.0*32 install on Oct 30

Replace **<ENTER>**

Loading Routines for PXRM*2.0*32 Routine PXRMBLD is not on the disk....

Send mail to: IT.PROGRAMMER // **<ENTER>**

IT,PROGRAMMER

Select basket to send to: IN// **<ENTER>**

And Send to: <ENTER>

2.5.Backout plan (optional)

2.5.1. To remove the Reminder Exchange Entries from VistA

- 1. Select the Reminder Exchange Menu Option.
- 2. Select the Exchange File entries that were installed by this patch. Example: CPT 1 Initial

Warning: There is no confirmation question prior to the delete function in step 3.

3. Select the number that matches the entry you want to remove; this will select the option: DFE Delete Exchange File Entry.
The Exchange File Entry is deleted.

2.5.2. To delete the templates from VistA

In order to back out of the existing MHCR Dialog Templates, you must delete the templates that were added during installation.

- 1. Open CPRS and select any patient, then click the **Options** tab and select **Edit Shared Templates...**
 - The Template Editor screen opens.
- 2. Click **Action**, then select **Delete**.
- 3. Select the MHCR dialog templates list, then select the name of a template to be deleted.
 - A confirmation message appears.
- 4. Click **Yes** to confirm your delete.
- 5. Repeat steps 3-4 for all templates that were added during installation. Backout is complete.

3. Installing KIDS

Users **MAY** remain on the system, but installation should be done at **off peak hours** when use is low. The estimated installation time is 10-15 minutes.

- 1. Use the 'LOAD A DISTRIBUTION' option on the PackMan menu. The Host File name is: PXRM_2_0_32.KID
- 2. Answer YES to the question: "Want to Continue with Load? YES//"
 The patch has now been loaded into a Transport global on your system.
- 3. Use the KIDS option to install the Transport Global.
- 4. On the KIDS menu, under the 'Installation' menu, use the following options to print, compare, verify, and back up the transport global:
 - Print Transport Global
 - Compare Transport Global to Current System
 - Verify Checksums in Transport Global
 - Backup a Transport Global

- 5. From the 'Installation Menu' of the KIDS menu, run the option 'Install Package(s)', and then select the package 'PXRM*2.0*32' and proceed with the install.
- 6. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install'? NO//
- 7. Answer THE FOLLOWING according to your site's policy.
- 8. When prompted 'Want KIDS to INHIBIT LOGONs during the install?" NO //',respond NO
- 9. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//', respond NO

3.1.Installation

For an example of loading a distribution, see the appendix.

3.2.KIDS Utilities Options (Optional)

Print a List of Package Components using the "Utilities" menu options available with KIDS

Use the KIDS "**Build File Print**" option if you would like a complete listing of package components (e.g., routines and options) exported with this software.

>D ^XUP

Setting up programmer environment Terminal Type set to: C-VT100

Select OPTION NAME: XPD MAIN Kernel Installation & Distribution System menu

Edits and Distribution ...

Utilities ...

Installation ...

Select Kernel Installation & Distribution System Option: UTilities

Build File Print

Install File Print

Convert Loaded Package for Redistribution

Display Patches for a Package

Purge Build or Install Files

Rollup Patches into a Build

Update Routine File

Verify a Build

Verify Package Integrity

Select Utilities Option: Build File Print

Select BUILD NAME: PXRM*2.0*32 CLINICAL REMINDERS CLINICAL

REMINDERS RECORD SYSTEM

DEVICE: HOME// TELNET

Print Results of the Installation Process

Select Kernel Installation & Distribution System Option: UTilities

Build File Print Install File Print Edit Install Status

Convert Loaded Package for Redistribution

Display Patches for a Package Purge Build or Install Files Rollup Patches into a Build

Update Routine File Verify a Build

Verify Package Integrity

EXAMPLE: Install File Print

Select Utilities Option: INstall File Print

Select INSTALL NAME: PXRM*2.0*32

PXRM*2.0*32 Install Completed 10/30/13@19:26:15 => PXRM*2.0*32 ;Created on Oct 15, 2013@13:18:44

DEVICE: HOME// **<ENTER>** or Select another print device name

PACKAGE: PXRM*2.0*32 Nov 07, 2013 8:50 pm PAGE 1

COMPLETED ELAPSED

STATUS: Install Completed INSTALLED BY: PROGRAMMER,ONE

NATIONAL PACKAGE: CLINICAL REMINDERS

(Example: Install File Print continued)

INSTALL STARTED: OCT 30,2013@19:24:24 19:26:15 0:01:51

ROUTINES: 19:24:24

PRE-INIT CHECK POINTS:

XPD PREINSTALL STARTED 19:24:24 XPD PREINSTALL COMPLETED 19:24:24

FILES:

DATE LOADED: OCT 30,2013@19:18:12

REMINDER EXCHANGE 19:24:24

POST-INIT CHECK POINTS:

XPD POSTINSTALL STARTED 19:26:15 0:01:51

XPD POSTINSTALL COMPLETED 19:26:15

INSTALL QUESTION PROMPT ANSWER

XPI1 Want KIDS to INHIBIT LOGONs during the install NO XPZ1 Want to DISABLE Scheduled Options, Menu Options, and Protocols NO MESSAGES:

Install Started for PXRM*2.0*32: Oct 30, 2013@19:24:24

Build Distribution Date: Oct 15, 2013

Installing Routines:

Oct 30, 2013@19:24:24

Running Pre-Install Routine: PRE^PXRMP32I

DISABLE options.

DISABLE protocols.

Installing Data Dictionaries:

Oct 30, 2013@19:24:24

Installing Data:

Oct 30, 2013@19:24:24

Running Post-Install Routine: POST^PXRMP32I

ENABLE options.

ENABLE protocols.

There are 1 Reminder Exchange entries to be installed.

1. Installing Reminder Exchange entry VA-MH EBP DIALOGS INCREMENT 3

Updating Routine file...

Updating KIDS files...

PXRM*2.0*32 Installed. Oct 30, 2013@19:26:15

3.3.CPRS Template Installation

The following section details how you will use the TIU menu option "CPRS REMINDER CONFIGURATION" to prepare the newly installed dialog templates for use. This sets the access level for the templates to be made available for use in the Progress Note template drawer. Typically, the Clinical Application Coordinator (CAC) is designated to modify the Shared Templates folder, although this may not be the case at your facility.

3.3.1. Setting the User Class

Before you can edit the Shared Templates, you must set the User Class.

- 1. Select CPRS Configuration (IRM) Option.
- 2. Select General Parameter Tools Menu Option.
- 3. Select Edit Parameter Values.
- 4. Select **PARAMETER DEFINITION NAME: TIU FIELD EDITOR CLASSES**, then set the parameter values. Normally the Clinical Coordinator User Class is set at a SYSTEM Level.

EXAMPLE: Valu	ues for TIU	FIELD	EDITOR CLASSES
Parameter	Insta	ince	Value
SYS: VISTA.TES	ST.ORG	10	CLINICAL COORDINATOR

3.3.2. Preparing the templates

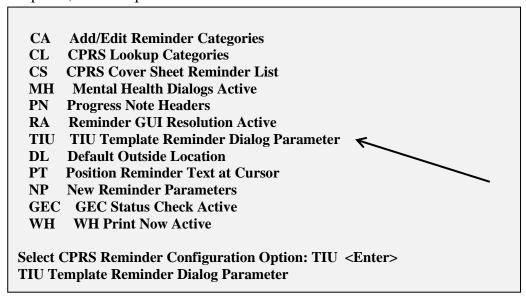
1. Select **CPRS Reminder Configuration** (located on the Reminder Managers Menu).

```
CF
             Reminder Computed Finding Management ...
             Reminder Definition Management ...
             Reminder Sponsor Management ...
Reminder Taxonomy Management ...
Reminder Term Management ...
Reminder Location List Management ...
    MXT
   LM
   RX
             Reminder Exchange
   RT
             Reminder Test
            Other Supporting Menus ...
Reminder Information Only Menu ...
Reminder Dialog Management ...
   05
   INFO
   DM
             CPRS Reminder Configuration .
   CP
             Reminder Reports ...
Reminders MST Synchronization Management ...
   RP
   MST
             Reminder Patient List Menu ...
   PL
   PAR
             Reminder Parameters ...
   ROC
             Reminder Order Check Menu ...
             Reminder Extract Menu ...
   XM
   GEC
             GEC Referral Report
Select Reminder Managers Menu Option: CP CPRS Reminder Configuration
```

Reminder Managers Menu

The CPRS Reminder Configuration menu opens.

2. Select **TIU Template Reminder Dialog Parameter**. This allows you to enter the MHCR dialog templates to be accessed via the Shared template functionality as standalone templates, or as templates linked to TIU titles.



CPRS Reminder Configuration Menu

3. The example below reflects a selection at the "SYSTEM" level. This level is recommended for ALL CPRS user access. Depending on the organization at your individual facility, determine whether to set the dialogs or reminders to the User, Service, Division or SYSTEM Levels access.

Re	eminder D	ialogs a	llows as Templates may be set for the following:	
1	User	USR	[choose from NEW PERSON]	
3	Service	SRV	[choose from SERVICE/SECTION]	
4	Division	DIV	[SOFTWARE SERVICE]	
5	System	SYS	[VISTA.TEST.ORG]	
	-			

4. Enter selection: **5 System VISTA.TEST.ORG**

Setting Reminder Dialogs allows as Templates for System: VISTA.TEST.ORG Select Display Sequence: ? <ENTER> to display the list of available templates for editing. The listing below contains reminder dialogs from previous release with names similar to the reminder dialogs being released with this patch.

Display	Sequence Value
1	VA-MH ACT FOR DEPRESSION 3 CLOSING PHASE
5	VA-MH ACT FOR DEPRESSION 2 ACTION PHASE
10	VA-MH ACT FOR DEPRESSION 1 BEGINNING PHASE
15	VA-MH ACT FOR DEPRESSION EARLY TERMINATION
20	VA-MH CBT-D 3 FINAL PHASE
25	VA-MH CBT-D 2 MIDDLE PHASE
30	VA-MH CBT-D 1 INITIAL PHASE
35	VA-MH CBT-D EARLY TERMINATION
40	VA-MH CPT 12 FINAL
45	VA-MH CPT 7 PROBLEMATIC THINKING
50	VA-MH CPT 6 CHALLENGING QUESTIONS
55	VA-MH CPT 11 ESTEEM
60	VA-MH CPT 9 TRUST
65	VA-MH CPT 10 POWER CONTROL
70	VA-MH CPT 8 SAFETY
75	VA-MH CPT 5 REWRITE EVENT
80	VA-MH CPT 4 TRAUMA EVENT SESSION
85	VA-MH CPT 3 ABC SHEET
90	VA-MH CPT 1 INDIVIDUAL INITIAL
95 100	VA-MH CPT EARLY TERMINATION
100	VA-MH CPT 2 MEANING SESSION
105	VA-MH PEI 6 EARLY TERMINATION
110	VA-MH PEI 3RD SESSION
115	VA-MH PEI 2ND SESSION
120 125	VA-MH PEI 1 INITIAL
130	VA-MH PEI 5 FINAL SESSION VA-MH PEI 4 IMAGINAL SESSIONS
135	VA-MH PEI 4 IMAGINAL SESSIONS VA-MH IPT 1 DEPRESSION
140	VA-MH IF 1 DEFRESSION VA-MH IPT 2 DEPRESSION
145	VA-MH IPT 3 DEPRESSION VA-MH IPT 3 DEPRESSION
150	VA-MH IPT 4 DEPRESSION MAINTENANCE
155	VA-MH IPT EARLY TERMINATION
160	VA-MIT IT EARLY TEACHMATION VA-MH CBT-I 1 EVALUATION SESSION
165	VA-MH CBT-1 2 INITIAL TREATMENT PHASE
170	VA-MH CBT-I 3 MIDDLE TREATMENT PHASE
175	VA-MH CBT-I 4 FINAL SESSION
176	VA-MH CBT-I EARLY TERMINATION
180	VA-MH BFT 1: ORIENTATION SESSION
185	VA-MH BFT 2: EDUCATION SESSION
190	VA-MH BFT 3: COMMUNICATION SESSION
195	VA-MH BFT 4: PROBLEM-SOLVING SESSION
200	VA-MH BFT 5: FINAL SESSION
205	VA-MH BFT 6: EARLY TERMINATION
210	VA-MH SST 1 INITIAL
215	VA-MH SST 2 GROUP VISIT
220	VA-MH SST 3 FINAL VISIT
225	VA-MH SST EARLY TERMINATION
230	VA-MH IBCT 1 INITIAL
235	VA-MH IBCT 2 INDIVIDUAL
240	VA-MH IBCT 3 NON VETERAN
245	VA-MH IBCT 4 FEEDBACK
250	VA-MH IBCT 5 THERAPY
255	VA-MH IBCT 6 TERMINATION
260	VA-MH IBCT EARLY TERMINATION

5. Select Display Sequence: 1 <ENTER> (Select the entry to edit by the number associated with the Dialog title)

Display Sequence: 1// <ENTER>

Clinical Reminder Dialog: VA-CPT 1 INDIVIDUAL INITIAL// VA-CPT 1

INDIVIDUAL INITIAL reminder dialog NATIONAL

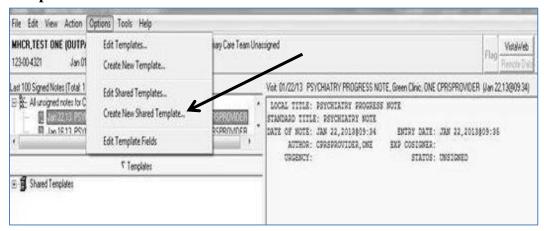
...OK? Yes// (Yes) <ENTER>

- 6. Select Display Sequence: Enter additional Display Sequence
 - --OR---

<ENTER> if no more entries to edit.

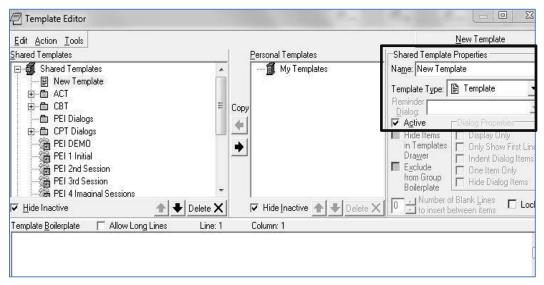
3.3.3. Adding the templates to the CPRS template drawer

1. Open CPRS and select any patient, then click **Options** and select **Create New Shared Template...**



CPRS Options menu

The Template Editor screen opens, showing a Shared Template Properties section with an editable Name field, a Template Type list, and an Active check box.



Shared Template Properties section of Template Editor screen

2. Type the name of a new template (notice that the template name appears on the left side of the screen, in the list of Shared Templates). Make sure that the Active check box is checked. Below is a list of mandated template drawer names for the Evidence-Based Psychotherapy (EBP) Reminder Dialogs.

Note: Each EBP training program will educate their staff trainees and MH providers on the use of these EBP templates, and uniform naming will assist staff in knowing how to complete certain fields in specific reminder dialogs. Mental Health Services (VACO) <u>mandates</u> that the following names be used when adding these reminder dialogs to the local CPRS template drawer:

Behavioral Family Therapy - BFT

- BFT 1 Orientation
- BFT 2 Education
- BFT 3 Communication
- BFT 4 Problem-Solving
- · BFT 5 Final Session
- BFT Early Term

Cognitive Behavioral Therapy for Insomnia - CBT-I *

- CBT-I: 1 Evaluation
- · CBT-I: 2 Initial
- CBT-I: 3 Middle
- CBT-I: 4 Final Session
- CBT-I: Early Term

*Please place a colon (:) following CBT-I so that the capital I does not visually join with its following numbers; otherwise, the template appears to be named (for example) CBT-11 Evaluation versus CBT-I: 1 Evaluation.

Integrative Behavioral Couple Therapy - IBCT

- IBCT 1 Initial
- · IBCT 2 Individual

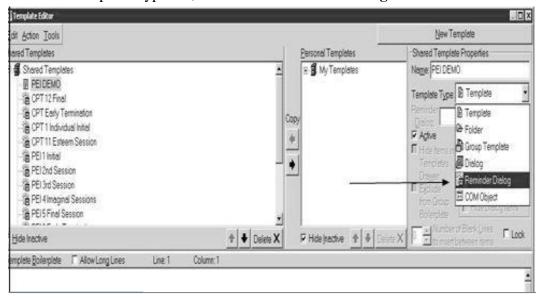
- IBCT 3 Non-Veteran
- IBCT 4 Feedback
- IBCT 5 Therapy
- IBCT 6 Termination
- IBCT Early Term

Interpersonal Psychotherapy for Depression - IPT

- IPT-D 1 Initial
- IPT-D 2 Intermediate
- IPT-D 3 Termination
- IPT-D 4 Maintenance
- IPT-D Early Term

Social Skills Training - SST

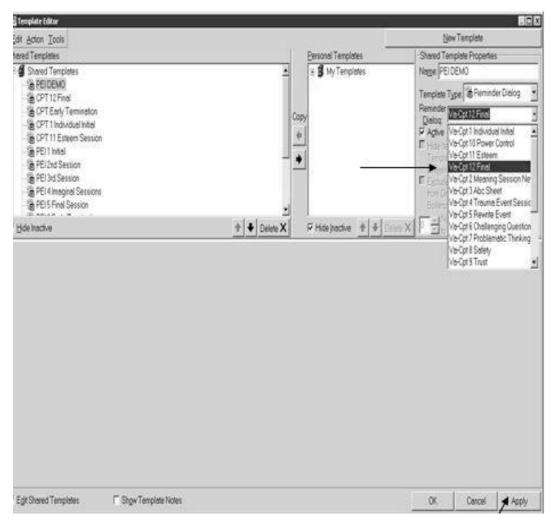
- SST 1 Initial
- SST 2 Group Visit
- SST 3 Final Visit
- · SST Early Term
- 3. Click the Template Type list, then select **Reminder Dialog**.



Shared Template Properties section with arrow pointing to the selection in the Template Type list

The reminder dialog template names appear below the Template Type field as shown in the screen shot below step 4.

4. Verify the selections, then click **Apply**.

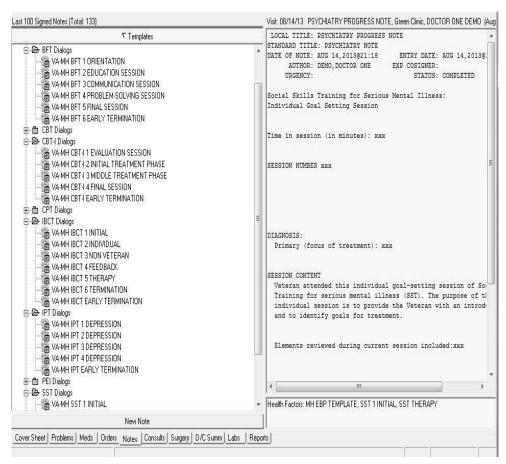


Reminder Dialog section with arrow pointing to template names, and another arrow pointing to the Apply button

3.3.4. Verifying that the templates are properly installed

- 1. Open CPRS and select any patient, then click **Notes**, then click **Templates**. The Shared Templates icon displays.
- 2. Expand the Shared Templates drawer.
- 3. Verify that the expanded list of Shared Templates lists the Patch PXRM*2.0*32 protocols and their templates as shown below.

Note: The example may also show template titles from the previous increment.



Expanded list of templates

See the MHCR PXRM*2.0*32 Dialog Templates User Guide (PXRM_2_0_32_UG.PDF) for specific instructions on accessing and using the individual dialog templates included in this patch.

Appendix - Example of an installation

The steps are provided as prompts on your screen. User response is in **Bold** characters. Select Kernel Installation & Distribution System Option: **Installation <Enter>**

- 1 Load a Distribution
- 2 Verify Checksums in Transport Global
- 3 Print Transport Global
- 4 Compare Transport Global to Current System
- 5 Backup a Transport Global
- 6 Install Package(s)

Restart Install of Package(s)

Unload a Distribution

Select Installation Option: 1 < Enter> Load a Distribution Enter a Host File: < your directory>\PXRM 2 0 32.KID

KIDS Distribution saved on Oct 30, 2013@19:18:12

Comment: PXRM*2.0*32

This Distribution contains Transport Globals for the following Package(s):

PXRM*2.0*32 Distribution OK!

Want to Continue with Load? YES// **<Enter>** Loading Distribution...

PXRM*2.0*32

Use INSTALL NAME: PXRM*2.0*32 to install this Distribution.

Select INSTALL NAME: PXRM*2.0*32<Enter>

Loaded from Distribution 10/30/13@19:18:12

=> PXRM*2.0*32; Created on Oct 15, 2013@13:18:44

This Distribution was loaded on Oct 30, 2013@19:18:12 with header of

PXRM*2.0*32; Created on Oct 15, 2013@13:18:44

It consisted of the following Install(s):

PXRM*2.0*32

Checking Install for Package PXRM*2.0*32

Install Questions for PXRM*2.0*32

Incoming Files:

811.8 REMINDER EXCHANGE (including data)

Note: You already have the 'REMINDER EXCHANGE' File.

I will OVERWRITE your data with mine.

Want KIDS to INHIBIT LOGONs during the install? NO// <Enter> Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO// <Enter> 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// <Enter> Install Started for PXRM*2.0*32: Oct 30, 2013@19:24:24 Build Distribution Date: Oct 15, 2013 **Installing Routines:** Oct 30, 2013@19:24:24 Running Pre-Install Routine: PRE^PXRMP32I DISABLE options. DISABLE protocols. Installing Data Dictionaries: Oct 30, 2013@19:24:24 Installing Data: Oct 30, 2013@19:24:24 Running Post-Install Routine: POST^PXRMP32I PXRM*2.0*32 ENABLE options. ENABLE protocols. There are 1 Reminder Exchange entries to be installed. 1. Installing Reminder Exchange entry VA-MH EBP DIALOGS INCREMENT 3 Updating Routine file... Updating KIDS files... PXRM*2.0*32 Installed. Oct 30, 2013@19:26:15 **Install Message Sent** 100% | 25 50 75 | Complete [-----]

Install Completed