



Palliative Care National Clinical Template

Patch PXRM*2.0*31

INSTALLATION and SETUP GUIDE

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Product Development
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Introduction

Patch PXRM*2.0*31 is one of the first patches that uses the recently approved expedited patch process. This patch releases the Palliative Care National Clinical Template without any changes to routines, data dictionaries, or other package functions – “content” only. The reminder dialog is VA-PALLIATIVE CARE NATIONAL CLINICAL TEMPLATE.

There are two Reminder Exchange entries that will be installed as part of this patch.

1. VA-PALLIATIVE CARE CONSULT
2. VA-PATCH 31 POST HS COMPONENTS

Palliative Care National Clinical Template (PC-NCT)

The VA Hospice and Palliative Care (HPC) program office has sponsored the development of this reminder dialog template to document provider-based palliative care consultations at all sites within VHA. This template is critical to improving the process and documentation of clinical care, and facilitating high quality palliative care and programmatic quality improvement. It is the intent of the HPC program office that this national template be formally distributed to VA palliative care programs for voluntary use throughout VHA in early 2014.

The current version of the template, PC-NCT 3.0, for national distribution, was developed by the Quality Improvement Resource Center (QuIRC), based in Los Angeles, CA. QuIRC serves as one of three national Quality Centers that support the HPC’s Comprehensive End-of-Life Care Initiative to foster quality improvement. QuIRC built the template based on a comprehensive review of the literature and in consultation with a wide variety of program stakeholders and clinical experts. There has been extensive involvement from the field in order to obtain concurrence and refine earlier versions. Our program office goal is to have at least 60% of the VA facilities adopt the PC-NCT over the next two years.

Using an earlier version of PC-NCT in 2010, QuIRC gauged interest from facilities about participating in a User Community in order to pilot the template in a clinical setting; garnered feedback regarding the content, ease of use, and utility of the tool; and assessed attitudes surrounding the tool’s adoption and implementation. After identifying facilities interested in piloting the tool, QuIRC selected five sites (Baltimore, Battle Creek, Indianapolis, Birmingham, and Salt Lake) to make up the User Community based on geographic diversity, palliative care program size and complexity, academic and non-academic status, and the local availability of evaluation resources. The PC-NCT was disseminated to the User Community sites in August 2010. User Community conference calls have been held at least once per month in which we gather valuable feedback to make ongoing modifications which are reflected in the PC-NCT version 3.0. This most recent version captures aspects of care that are *most* important to assess during a palliative care consultation in a manner that is efficient and helpful to clinicians.

In order for the HPC performance measure to be met for a given palliative care consult, four elements must be present – primary diagnosis, CPT code (ending in 3, 4 or 5), qualified provider (MD/DO, CNS, NP, PA) and correct DSS code (351 or 353). For this to occur for an inpatient, the CPRS location of the patient **MUST** be changed to an outpatient clinic location setup for this purpose **PRIOR** to beginning the note. The reminder dialog itself has a “change location?” prompt built in.

Per VHA Directive 2009-002 Patient Care Data Capture: “It is VHA policy to capture and report inpatient appointments in outpatient clinics, inpatient billable professional services, inpatient professional mental health services, and outpatient care data to support the continuity of patient care, resource allocation, performance measurement, quality management, provider productivity, research, and third-party payer collections.” Hence, the following is highlighted:

- The correct coding can only roll up to the VSSC data base if linked to an encounter. Encounter data is not generated for inpatient locations.
- New clinic locations for inpatient palliative care/hospice consultations must be created for each site. These locations should be set up as “count” clinics **without** any appointment grid. One clinic should be associated with DSS identifier 351 and one with DSS identifier 353. The clinic names should be followed by “-X” in order to ensure that these locations are not included in VHA wait time and missed opportunity measures. Examples of inpatient clinic locations might be: “SITENAME-INPT PALL CONSULT-X” OR “SITENAME-INPT HOSPICE-X.”
- For patients seen on an outpatient basis, providers simply select an appropriate outpatient palliative care or hospice location and complete an encounter form as they normally do. The outpatient palliative care clinic location(s) should be associated with Hospice (DSS 351) or Palliative Care (DSS 353) (note: DSS identifiers for clinics are not displayed in CPRS). For inpatients, the note author has to take four steps in sequence prior to documenting the consultation:
 - Before starting a note, click on patient location (next to patient name);
 - Click on the “new visit” tab
 - Select the appropriate “inpatient” palliative care clinic location
 - Start a consultation note using the appropriate title for their site

This template is created in a modular format, separating the nine content areas. When using the template, clinicians can choose which modules they would like to complete. They can use the entire template to create a comprehensive palliative care consultation. Or they can choose one module at a time, such as the symptom module, to address a focused area of concern.

Pre-Installation

*Required Software for patch PXRM*2.0*31*

Package/Patch	Namespace	Version	Comments
Clinical Reminders	PXRM	2.0	Fully patched
Health Summary	GMTS	2.7	Fully patched
HL7	HL	1.6	Fully patched
Kernel	XU	8.0	Fully patched
MailMan	XM	8.0	Fully patched
Mental Health	YS	5.01	Fully patched
VA FileMan	DI	22	Fully patched

Related Documentation

Documentation	Documentation File name
Installation and Setup Guide	PXRM_2_31_IG.PDF

Web Sites

Site	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 Document Library	http://www.va.gov/vdl/	Contains manuals for Clinical Reminders and

Installation

This manual describes how to install PXRM*2.0*31.

This build can be installed with users on the system, but it should be done during non-peak hours.

The installation needs to be done by a person with DUZ(0) set to "@."

1. Retrieve the host file containing the patch

Use ftp to access the build (the name of the host file is PXRM_2_0_31 .KID) from one of the following locations (with the ASCII file type):

Albany	ftp.fo-albany.med.va.gov	<ftp://ftp.fo-albany.med.va.gov>
--------	--------------------------	----------------------------------

Hines	ftp.fo-hines.med.va.gov	<ftp://ftp.fo-hines.med.va.gov>
Salt Lake City	ftp.fo-slc.med.va.gov	<ftp://ftp.fo-slc.med.va.gov>

2. Install the build first in a training or test account.

Installing in a non-production environment will give you time to get familiar with new functionality and complete the setup for reminders and dialogs prior to installing the software in production.

3. Load the distribution.

In programmer mode type, D ^XUP, select the Kernel Installation & Distribution System menu (XPD MAIN), then the Installation option, and then the option LOAD a Distribution. Enter your directory name and PXRМ_2_0_31.KID at the Host File prompt.

Example

```
Select Installation Option: LOAD a Distribution
Enter a Host File:<your directory name>PXRМ_2_0_31.KID
KIDS Distribution saved on FEB 29:.KID
```

From the Installation menu, you may elect to use the following options:

a. Backup a Transport Global

This option will create a backup message of any routines exported with the patch. It will NOT back up any other changes such as DDs or templates.

b. Compare Transport Global to Current System

This option will allow you to view all changes that will be made when the patch is installed. It compares all components of the patch (routines, DDs, templates, etc.).

c. Verify Checksums in Transport Global

This option is not needed since there are NO routines being installed

4. Install the build.

From the Installation menu on the Kernel Installation and Distribution System (KIDS) menu, run the option Install Package(s). Select the build PXRМ .KID and proceed with the install. If you have problems with the installation, log a Remedy ticket and/or call the National Help Desk to report the problem.

```
Select Installation & Distribution System Option: Installation
Select Installation Option: INSTALL PACKAGE(S)
Select INSTALL NAME: PXRМ*2.0*31
```

Answer "NO" to the following prompt:

Want KIDS to INHIBIT LOGONs during install? NO// **NO**

Installation Example

See [Appendix A](#).

5. Install File Print

Use the KIDS Install File Print option to print out the results of the installation process. You can select the multi-package build or any of the individual builds included in the multi-package build.

```
Select Utilities Option: Install File Print
Select INSTALL NAME: PXR*2.0*31
```

6. Build File Print

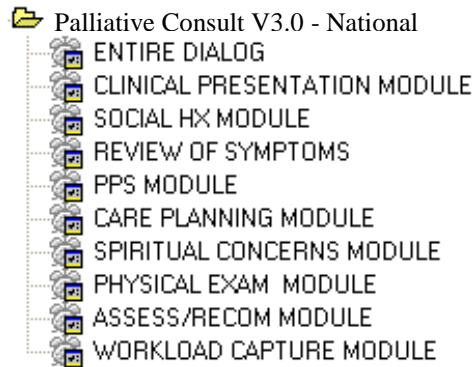
Use the KIDS Build File Print option to print out the build components.

```
Select Utilities Option: Build File Print
Select BUILD NAME: PXR*2.0*31
DEVICE: HOME//
```

Post-Installation Setup

1. Once the installation is complete -- To enable the dialog: Go to Reminder Dialog Management Option: Reminder Dialogs. Change the view to DIALOG, and find the NATIONAL PALLIATIVE CARE CONSULT on the list. Edit the entry and remove the text in the DISABLE field by entering @.
2. To use the reminder dialog as a template, use the menu option XPAR EDIT PARAMETER.
Choose to edit the parameter: TIU TEMPLATE REMINDER DIALOGS
Add this reminder dialog to the list at the System level.
3. In CPRS, open the Edit Shared Templates option and create a new template with the type of reminder dialog. From the Reminder Dialog drop down list, find NATIONAL PALLIATIVE CARE CONSULT and attach it to the template. You can attach the reminder dialog to your facility selected progress note title, if desired.

- You may want to include the entire dialog, as well as each individual module in Shared Templates. This will allow the user to select only one (or more modules) if they want to use only certain modules of the template. (This also allows them to complete a module or two, leave the note unsigned, and then come back later to complete other modules.) If you decide to put the individual modules in Shared Templates, you must complete step 5 above for each module, and place them in a folder for easy access. See example below:



TIU Health Summary Objects:

Three TIU objects are included in the National Palliative Care Consult template:

- PALLI PHQ2 PH9 [location = Element: VA-PALLI CONS PHQ2/9 OBJECT (E)]
- PALLI WEIGHT [location = Element: VA-PALLI CONS VITALS (E)]
- PALLI VITALS [location = Element: VA-PALLI CONS VITALS (E)]

The Health Summary Type for each TIU object is listed below

Type Name: PALLI PHQ2 PH9									
Title:									
Owner: CPRSPROVIDER, ONE									
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: no									
SUPPRESS SENSITIVE PRINT DATA:									
Abb	Ord	Component Name	Max Occ	Time	Hos Loc	ICD Text	Pro Nar	CPT Mod	Selection

-									
MHAS	5	MHA Score	1						
									PHQ-2
									PHQ9

Type Name: PALLI WEIGHT									
Title:									
Owner: CPRSPROVIDER, ONE									
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:									
SUPPRESS SENSITIVE PRINT DATA:									
Abb	Ord	Component Name	Max Occ	Time	Hos Loc	ICD Text	Pro Nar	CPT Mod	Selection

SVS	5	Vital Signs Selected 3							WEIGHT

Type Name: PALLI VITALS									
Title:									
Owner: CPRSPROVIDER, ONE									
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA:									
SUPPRESS SENSITIVE PRINT DATA:									
Abb	Ord	Component Name	Max Occ	Time	Hos Loc	ICD Text	Pro Nar	CPT Mod	Selection

SVS	5	Vital Signs Selected 3							
TEMPERATURE									
PULSE									
RESPIRATION									
BLOOD PRESSURE									

Appendix A

SMA5A3:SCT>D ^XUP

Setting up programmer environment
This is a TEST account.

Terminal Type set to: C-VT320/132

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

Edits and Distribution ...
Utilities ...
Installation ...
Patch Monitor Main Menu ...

Select Kernel Installation & Distribution System <TEST ACCOUNT> Option: INSTallation

- 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 <TEST ACCOUNT> Option: 1 Load a Distribution
Enter a Host File: <your directory name>PXRM_2_0_31.KID

KIDS Distribution saved on Jul 01, 2013@11:29:46
Comment: Palliative Care

This Distribution contains Transport Globals for the following Package(s):
Build PXRM*2.0*31 has been loaded before, here is when:

PXRM*2.0*31 Install Completed
was loaded on Jul 01, 2013@12:17:07

OK to continue with Load? NO// YES

Distribution OK!

Want to Continue with Load? YES//
Loading Distribution...

PXRM*2.0*31
Use INSTALL NAME: PXRM*2.0*31 to install this Distribution.

- 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 <TEST ACCOUNT> Option: INSTAll Package(s)
Select INSTALL NAME: PXRM*2.0*31 7/2/13@12:56
=> Palliative Care ;Created on Jul 01, 2013@11:29:46

This Distribution was loaded on Jul 02, 2013@12:56 with header of
Palliative Care ;Created on Jul 01, 2013@11:29:46
It consisted of the following Install(s):
PXRM*2.0*31

Checking Install for Package PXRM*2.0*31

Install Questions for PXRM*2.0*31

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//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//

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// TELNET PORT

Install Started for PXRMP*2.0*31 :
Jul 02, 2013@12:56:15

Build Distribution Date: Jul 01, 2013

Installing Routines:
Jul 02, 2013@12:56:15

Running Pre-Install Routine: PRE^PXRMP31I

DISABLE options.

DISABLE protocols.

Installing Data Dictionaries:
Jul 02, 2013@12:56:16

Installing Data:
Jul 02, 2013@12:56:17

Running Post-Install Routine: POST^PXRMP31I

ENABLE options.

ENABLE protocols.

There are 2 Reminder Exchange entries to be installed.

1. Installing Reminder Exchange entry VA-PALLIATIVE CARE CONSULT
2. Installing Reminder Exchange entry VA-PATCH 31 POST HS COMPONENTS

Updating Routine file...

Updating KIDS files...

PXRMP*2.0*31 Installed.
Mar 03, 2014@14:19:29

Not a production UCI

PXRM*2.0*31

Install Completed