Clinical Information Support System

Patient-Centered Management Module (PCMM)

PCMM Web-VistA Installation Guide

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Office of Information and Technology

Enterprise Systems Engineering

Project Management Office

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Revision History

Date	Version	Description	Author
November 2015	1.4	Minor edits.	Kate Hula
October 2015	1.3	Added VistA Patch Rollback instructions.	Andy Thompson / Kate Hula
June 2015	1.2	Updated Patch descriptions	Kate Hulae
March 2015	1.1	Technical edit.	Shawnta Davis / K. Hula
October 2014	1.0	Initial document.	Andy Thompson / Madhavi Yarlagadda,

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1. Background

This is the Patient-Centered Management Module Web Installation Guide. This guide contains step-by-step instructions for installing the VistA patches required to support the PCMM Web application.

The following patches are available with this release:

PCMM Web Informational Patch:
- WEBP*1*1 - Patient-Centered Management Module (PCMM) Web

VistA Patches:
- SD*5.3*620 – PCMM DATA EXTRACTS (Release April 2015)
- SD*5.3*603 – PCMM WEB LEGACY CHANGES
  - The VistA software for this patch is released as a KIDS host file. It may be downloaded from a secured FTP site as directed by the PCMM Web Implementation Team.
- OR*3.0*387 – PCMM WEB TEAM DISPLAY ENHANCEMENTS TO CPRS
  - The VistA software for this patch is released as a KIDS host file. It may be downloaded from a secured FTP site as directed by the PCMM Web Implementation Team.

NOTE: These patches are to be staggered when implementing into production and not to be installed all at once. This installation includes a Data Migration and that must be executed separately on the PCMM Web server in between the installation of SD*5.3*620 and SD*5.3*603. A CPRS Header Update job must be executed on the PCMM Web server between the installation of SD*5.3.603 and OR*3.0.*387. The installation of all patches must be coordinated between VistA and PCMM Web.

1.1. Purpose

The purpose of this Installation Guide specifies how the Patient-Centered Management Module web application will be evaluated and subsequently deployed within the Office of Enterprise Development (OED).

1.2. Scope

The scope of this plan encompasses the PCMM Web application, and related responsibilities. The plan specifies:

a. Pre-requisites for installing PCMM Web and PCMM Extracts.
b. Acceptance – a decision to manage the risk as falling within an acceptable risk tolerance range.

1.3. Pre-Requisite Considerations

The following are pre-requisite considerations for the PCMM Web application installation:

- Verify the user installing the PCMM Web has access to the National Patch Module and Forum to retrieve patches.
- The user knows how to install VistA Patches.
- The user knows how to retrieve files from the Host File System (HFS).

- The user has knowledge of Linux or VMS systems.
- The user must have the XUMGR and XUPROGMODE security keys.
- The user will execute the extract options on the "back-end" database server, where applicable.
- Executing the extract routines requires access to the Caché (M) command line. (programmer prompt).
- Executing patch SD*5.3*603 requires access to the Caché (M) command line (programmer prompt).

2. Patch SD*5.3*620 – PCMM Web Data Extracts

On April 9, 2015 (compliance date), Patch SD*5.3*620 was released. Therefore, all sites should have installed Patch SD*5.3*620 into production. This patch introduced menu options that will be used to extract PCMM data from the site's local Vista system. During deployment, each site is expected to FTP the extract files to the PCMM Web project team. These files will be used to perform data validation during PCMM Web Deployment.

> **IMPORTANT: DO NOT run the Post Installation instructions in this patch on the Production System until the site is scheduled to begin the PCMM Data Mitigation process. Each site will be scheduled for deployment and will receive notification from the Implementation Manager indicating the planned deployment date. In addition, the extraction menu options in the SD*5.3*620 patch should not be executed before the Data Validation process begins.**

- Each site will be contacted by the PCMM Implementation Manager to schedule PCMM Data Mitigation.
- This patch may be installed with users on the system. This patch should take less than 5 minutes to install.
- The file extract processing may be system resource intensive. It is recommended to schedule the post installation steps for non-peak hours.

2.1. Data Extract Instructions

These steps are executed once the site is scheduled for PCMM Web deployment. The steps below are preparation for data migration efforts. All sites are required to participate in the data migration prior to going live with the PCMM Web application. The Implementation Manager will schedule your site for deployment and schedule the Data Extract date. Legacy PCMM users must be off the system and complete with data entry during the data migration.

> **NOTE: DO NOT run the extract options detailed on your Production system until your site has been scheduled to begin the PCMM Data Mitigation process and deployment. An Implementation Manager will contact your site to schedule the PCMM Data Migration.**

- You may test the extract functionality in your site's Test Account, but do not perform the FTP steps in section 2.5. On the test systems, extracts can run at any time to verify functionality.

- Execute the extracts on the "back-end" database server (i.e., ecp node), where applicable, by staff with Caché (M) command line (programmer prompt) access and privileges (i.e., programmer mode access).

- The extract processing may be system resource intensive because Patient Team Assignment Extract and Patient Team Position extracts will be extracting all patients assigned to a PCMM Team. This process may take a substantial amount of time to complete due to the large file sizes. Ensure that the site's system has enough space to support storage of these files.

  Estimated Extract File sizes. The timing will vary site to site.

```
SIZE          STN   FILE_NAME                                    TIMING
------------------------------------------------------------------------------
50MB – 85MB   <SITE#>_PCMMPATIENTTEAMASSIGNMENT.TXT          4 – 12 HOURS
45MB – 80MB   <SITE#>_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT  4 – 12 HOURS
685KB – 1.5MB <SITE#>_PCMMPOSITIONASSIGNMENTHISTORY.TXT      2 – 10 MINUTES
145KB – 290KB <SITE#>_PCMMPRECEPTORASSIGNMENTHISTORY.TXT     2 – 10 MINUTES
30KB – 40KB   <SITE#>_PCMMTEAMHISTORY.TXT                    2 – 10 MINUTES
300KB – 400KB <SITE#>_PCMMTEAMPOSITIONHISTORY.TXT            2 – 10 MINUTES
495KB – 610KB <SITE#>_PCMMTEAMPOSITION.TXT                   2 – 10 MINUTES
35KB – 40KB   <SITE#>_PCMMTEAM.TXT                           2 – 10 MINUTES
```

- It is recommended to perform this extract during non-peak hours.

- The extract should run after all PCMM Legacy users are logged off the system.

- Run on the last business day before your scheduled installation/deployment date and schedule the extract for non-peak hours. Users should cease data entry in PCMM Web prior to the extract. If data entry is still in progress, some data may not be captured in the extract and may not be included in data migration.

NOTE: <u>DO NOT RUN the extract options until the site has been scheduled to begin data migration</u>. The implementation coordinator will contact the site with the scheduled date for data migration and additional assistance.

The Patient Team Assignment Extract makes a copy of all patients assigned to a PCMM Team. This process will take a while due to the size of the extract. Additionally, this applies for the Patient Team Position Assignment Extract.

Complete the following three steps to perform the data extracts for PCMM data

1. Assign the PCMM DATA EXTRACTS Security Key to yourself or the user who will be performing the extract.

2. Determine extract file space requirement.

3. Execute the data extract options.

4. FTP the extract files.

2.2.Assign PCMM DATA EXTRACTS Security Key

The user that runs the extracts will need the PCMM DATA EXTRACTS Security Key. The security key must be assigned before the extract files can be created.

```
Use the Menu Management option:


              Core Applications ...
              Device Management ...
       FM     VA FileMan ...
              Manage MailMan...
              Menu Management ...
              Programmer Options ...
              Operations Management ...
              Information Security Officer Menu ...
              TaskMan Management ...
              User Management ...
       HL7    HL7 Main Menu ...
       VDEF   VDEF Configuration and Status ...
              Application Utilities ...
              Capacity Planning ...
              FileMan Access for the OIG ...


Select Systems Manager Menu <TEST ACCOUNT> Option: Menu Management


              Edit options
              Key Management ...
              Secure Menu Delegation ...
              Restrict Availability of Options
              Option Access By User
              List Options by Parents and Use
              Fix Option File Pointers
              Help Processor ...
       OPED   Screen-based Option Editor
              Display Menus and Options ...
              Menu Rebuild Menu ...
              Out-Of-Order Set Management ...
              See if a User Has Access to a Particular Option
              Show Users with a Selected primary Menu


Select Menu Management <TEST ACCOUNT> Option: 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 <TEST ACCOUNT> Option: Allocation of Security Keys

Allocate key: PCMM DATA EXTRACTS          enter the security key name

Another key:
```

```
Holder of key: <User Name>                    enter the user's name

Another holder:

You've selected the following keys:

PCMM DATA EXTRACTS

You've selected the following holders:

<User Name>

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

PCMM DATA EXTRACTS  being assigned to:
     <User Name>
```

If the user was logged on before the key was assigned, log off, and then log on again. A user's security keys are determined at logon time.

2.2.1. Determine Extract File Space Requirement

Use the following information to determine how much disk space will be required to store the PCMM extract files.

Extract File Name	Source Global Name	Extract Record Size
site_PCMMPATIENTTEAMASSIGNMENT.TXT	^SCPT(404.42,	135
site_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT	^SCPT(404.43,	109
site_PCMMTEAM.TXT	^SCTM(404.51,	117
site_PCMMPOSITIONASSIGNMENTHISTORY.TXT	^SCTM(404.52,	114
site_PCMMPRECEPTORASSIGNMENTHISTORY.TXT	^SCTM(404.53,	141
site_PCMMTEAMPOSITION.TXT	^SCTM(404.57,	200
site_PCMMTEAMHISTORY.TXT	^SCTM(404.58,	65
site_PCMMTEAMPOSITIONHISTORY.TXT	^SCTM(404.59,	73

Run the following commands to determine the record count for each file at the site. The number in red is the record count in each file.

```
CHEYL12>D ^%G

Device:
Right margin: 80 =>
Screen size for paging (0=nopaging)? 24 =>
For help on global specifications DO HELP^%G
Global ^SCPT(404.42,0 -- NOTE: translation in effect
^SCPT(404.42,0)="PATIENT TEAM ASSIGNMENT^404.42PIA^77123^76507"

Global ^SCPT(404.43,0 -- NOTE: translation in effect
^SCPT(404.43,0)="PATIENT TEAM POSITION ASSIGNMENT^404.43PI^84688^83574"

Global ^SCTM(404.51,0 -- NOTE: translation in effect
```

```
^SCTM(404.51,0)="TEAM^404.51^1061^1059"

Global ^SCTM(404.52,0 -- NOTE: translation in effect
^SCTM(404.52,0)="POSITION ASSIGNMENT HISTORY^404.52PIA^2316^1972"

Global ^SCTM(404.53,0 -- NOTE: translation in effect
^SCTM(404.53,0)="PRECEPTOR ASSIGNMENT HISTORY^404.53PIA^156^146"

Global ^SCTM(404.57,0 -- NOTE: translation in effect
^SCTM(404.57,0)="TEAM POSITION^404.57IA^5544^5479"

Global ^SCTM(404.58,0 -- NOTE: translation in effect
^SCTM(404.58,0)="TEAM HISTORY^404.58PIAO^1079^1076"

Global ^SCTM(404.59,0 -- NOTE: translation in effect
^SCTM(404.59,0)="TEAM POSITION HISTORY^404.59PIA^5364^5301"
```

To determine the size requirements, multiply the record count by the record size for each file. Add these totals together and then add 25%. The result should be the approximate disk space (in bytes) required for the local storage of the extract files. (For example, divide by 1024 for KB; 1,048,576 for MB.)

2.3. Execute Data Extract Routines

1. The extract processing may be system resource intensive. It is recommended to schedule this for non-peak hours.

2. The data extract files are stored in the host file default directory on the site's system. This path will display on the screen as the extracts are run. Disk space may be verified before running the extract file using this command:

```
W $ZF(-1,$S($system.Version.GetCompBuildOS()["UNIX":"df -h",
$system.Version.GetCompBuildOS()["VMS": "show device D /unit=byte")),!
```

3. The SCMC PCMM EXTRACT ROUTINES option may be assigned to a user's Secondary Menu Options, and executed from any menu. Or, executed using **D ^XUP** at the Caché command prompt, then enter **SCMC PCMM EXTRACT ROUTINES** at the option prompt.

4. The list of eight extracts will display. Execute each data extract by following the steps below:

   a. The Patient Team Assignment Extract and Patient Team Position Assignment Extract may take several hours to run. DO NOT run the extracts at the same time. It is recommended patient extracts run during non-peak/off hours.
   b. Run the smaller extracts before the Patient Team Assignment Extract and Patient Team Position Assignment Extract.

5. Extract files should run one at a time to avoid interruption of service or slower response times.

```
Step 2
VISTA>D ^XUP

Setting up programmer environment
This is a TEST account.
```

```
        Terminal Type set to: C-VT320

        Select OPTION NAME: SCMC PCMM EXTRACT ROUTINES        SCMC PCMM Extract
        Routines

                Team File Extract
                Team History File Extract
                Team Position File Extract
                Team Position History Extract
                Patient Team Assignment Extract *
                Patient Team Position Assignment Extract*
                Position Assignment History Extract
                Preceptor Assignment History Extract
```

***Note: Patient Team Assignment Extract and Patient Team Position Assignment
Extract will take the longest. Expect that these two extracts will take several
hours.**

```
        Select SCMC PCMM Extract Routines <TEST ACCOUNT> Option:
```

Example:

```
        Select SCMC PCMM Extract Routines <TEST ACCOUNT> Option: Team File Extract

        <directory name> will display here
```

6. Repeat these steps for each of the menu options. Eight extract files will be created. Each file
    name is prefixed with the local site number. FTP the following the extracts to the PCMM Web
    Data Migration Staging Server.

```
        <site#>_PCMMPATIENTTEAMASSIGNMENT.TXT
        <site#>_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT
        <site#>_PCMMPOSITIONASSIGNMENTHISTORY.TXT
        <site#>_PCMMPRECEPTORASSIGNMENTHISTORY.TXT
        <site#>_PCMMTEAM.TXT
        <site#>_PCMMTEAMHISTORY.TXT
        <site#>_PCMMTEAMPOSITION.TXT
        <site#>_PCMMTEAMPOSITIONHISTORY.TXT
```

2.4.FTP Extract Files

NOTE: The extract files should be transmitted immediately after completion. Before the FTP process, contact the PCMM Web Systems Administrator via email at VHAISDPCMMDMTeam@va.gov and request your Username and Password before sending the files. The Systems Administrator will confirm the files have arrived.

- Secure FTP is required to copy the extract files to the PCMM Web Data Migration Staging Server. The FTP extract file location is:

    ftp://vhacrbftpciss01.ciss.cc.med.va.gov.

Caché (M) command line:

NOTE: 442 is a sample station number and used as an example.

```
VISTA>S X=$ZF(-1,sftp station_<site#>@10.208.148.20)
Connecting to 10.208.148.20...
station_442@10.208.148.20's password: password
sftp> cd jail
sftp> lcd <directory name>(directory where extract files reside, from above)
sftp> mput <site#>_PCMM*.TXT
Uploading ...
sftp> ls -l 442_PCMM*.TXT  (check transferred files)
File list ...
sftp> quit
VISTA>
```

Linux Example

List files

```
VISTA>S X=$ZF(-1, "ls /u06/CHEYL12/442_PCMM*") (directory where extract files reside,
from above
/u06/CHEYL12/442_PCMMPATIENTTEAMASSIGNMENT.TXT
/u06/CHEYL12/442_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT
/u06/CHEYL12/442_PCMMPOSITIONASSIGNMENTHISTORY.TXT
/u06/CHEYL12/442_PCMMPRECEPTORASSIGNMENTHISTORY.TXT
/u06/CHEYL12/442_PCMMTEAMHISTORY.TXT
/u06/CHEYL12/442_PCMMTEAMPOSITIONHISTORY.TXT
/u06/CHEYL12/442_PCMMTEAMPOSITION.TXT
/u06/CHEYL12/442_PCMMTEAM.TXT
VISTA>
```

FTP

```
VISTA>S x=$ZF(-1,"sftp station_442@10.208.148.20")
```

```
Connecting to 10.208.148.20...
station_442@10.208.148.20's password: password
sftp> cd jail
sftp> lcd /u06/CHEYL12/ (directory where extract files reside, from above)
sftp> mput 442_PCMM*.TXT
Uploading 442_PCMMPATIENTTEAMASSIGNMENT.TXT to /jail/442_PCMMPATIENTTEAMASSIGNMT
442_PCMMPATIENTTEAMASSIGNMENT.TXT              100% 9461KB   4.6MB/s   00:02
Uploading 442_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT to /jail/442_PCMMPATIENTTEAT
442_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT      100% 7423KB   7.3MB/s   00:01
Uploading 442_PCMMPOSITIONASSIGNMENTHISTORY.TXT to /jail/442_PCMMPOSITIONASSIGNT
442_PCMMPOSITIONASSIGNMENTHISTORY.TXT          100%  171KB 170.5KB/s   00:01
Uploading 442_PCMMPRECEPTORASSIGNMENTHISTORY.TXT to /jail/442_PCMMPRECEPTORASSIT
442_PCMMPRECEPTORASSIGNMENTHISTORY.TXT         100%   14KB  14.2KB/s   00:00
Uploading 442_PCMMTEAM.TXT to /jail/442_PCMMTEAM.TXT
442_PCMMTEAM.TXT                               100%   85KB  85.0KB/s   00:00
Uploading 442_PCMMTEAMHISTORY.TXT to /jail/442_PCMMTEAMHISTORY.TXT
442_PCMMTEAMHISTORY.TXT                        100%   44KB  43.6KB/s   00:00
Uploading 442_PCMMTEAMPOSITION.TXT to /jail/442_PCMMTEAMPOSITION.TXT
442_PCMMTEAMPOSITION.TXT                       100%  631KB 631.4KB/s   00:00
Uploading 442_PCMMTEAMPOSITIONHISTORY.TXT to /jail/442_PCMMTEAMPOSITIONHISTORY.T
442_PCMMTEAMPOSITIONHISTORY.TXT                100%  175KB 175.2KB/s   00:00
sftp> ls -l 442_PCMM*.TXT                      check transferred files
-rwxr-xr-x    0 585      502      1327830 Oct 15 16:14 442_PCMMPATIENTTEAMASSIT
-rwxr-xr-x    0 585      502      7601008 Oct 15 16:14 442_PCMMPATIENTTEAMPOSIT
-rwxr-xr-x    0 585      502       174610 Oct 15 16:14 442_PCMMPOSITIONASSIGNMT
-rwxr-xr-x    0 585      502        14535 Oct 15 16:14 442_PCMMPRECEPTORASSIGNT
-rwxr-xr-x    0 585      502        91879 Oct 15 16:14 442_PCMMTEAM.TXT
-rwxr-xr-x    0 585      502        48604 Oct 15 16:14 442_PCMMTEAMHISTORY.TXT
-rwxr-xr-x    0 585      502       646586 Oct 15 16:14 442_PCMMTEAMPOSITION.TXT
-rwxr-xr-x    0 585      502       179384 Oct 15 16:14 442_PCMMTEAMPOSITIONHIST
sftp> quit
VISTA>
```

VMS Example

List files

```
VISTA>S X=$ZF(-1, "dir user$:[temp]442_PCMM*.TXT")

Directory USER$:[TEMP]

442_PCMMPATIENTTEAMASSIGNMENT.TXT;1
442_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT;1
442_PCMMPOSITIONASSIGNMENTHISTORY.TXT;1
442_PCMMPRECEPTORASSIGNMENTHISTORY.TXT;1                 442_PCMMTEAM.TXT;4
442_PCMMTEAMHISTORY.TXT;4               442_PCMMTEAMPOSITION.TXT;1
442_PCMMTEAMPOSITIONHISTORY.TXT;3

Total of 8 files.
VISTA>
```

FTP

> **NOTE: Ensure the sftp "traffic" messages in the Linux example above display or the files will need to be transferred individually.**

```
VISTA>S X=$ZF(-1, "sftp station_442@10.208.148.20")
station_442@10.208.148.20's password:
sftp> cd jail
/jail
sftp> lcd USER$:[TEMP]
USER$:[temp]
sftp> mput 442_PCMM*.TXT
or
sftp> put 442_PCMMPATIENTTEAMASSIGNMENT.TXT
442_PCMMPATIENTTEAMASSIGNMENT.TXT |   192B |   0.2 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT
442_PCMMPATIENTTEAMPOSITIONASSIGN |   337B |   0.3 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMPOSITIONASSIGNMENTHISTORY.TXT
442_PCMMPOSITIONASSIGNMENTHISTORY |   387B |   0.4 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMPRECEPTORASSIGNMENTHISTORY.TXT
442_PCMMPRECEPTORASSIGNMENTHISTOR |   182B |   0.2 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMTEAM.TXT
442_PCMMTEAM.TXT                  |   324B |   0.3 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMTEAMHISTORY.TXT
442_PCMMTEAMHISTORY.TXT           |   108B |   0.1 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMTEAMPOSITION.TXT
442_PCMMTEAMPOSITION.TXT          |   936B |   0.9 kB/s | TOC: 00:00:01 | 100%
sftp> put 442_PCMMTEAMPOSITIONHISTORY.TXT
442_PCMMTEAMPOSITIONHISTORY.TXT   |   152B |   0.1 kB/s | TOC: 00:00:01 | 100%
sftp> ls -l 442_PCMM*.TXT            check transferred files
-rw-r--r--    0 585      502            192 Sep  9 15:07 442_PCMMPATIENTTEAMASSIT
-rw-r--r--    0 585      502            337 Sep  9 15:08 442_PCMMPATIENTTEAMPOSIT
-rw-r--r--    0 585      502            387 Sep  9 15:08 442_PCMMPOSITIONASSIGNMT
-rw-r--r--    0 585      502            182 Sep  9 15:09 442_PCMMPRECEPTORASSIGNT
-rw-r--r--    0 585      502            324 Sep  9 15:09 442_PCMMTEAM.TXT
-rw-r--r--    0 585      502            108 Sep  9 15:10 442_PCMMTEAMHISTORY.TXT
-rw-r--r--    0 585      502            936 Sep  9 15:10 442_PCMMTEAMPOSITION.TXT
-rw-r--r--    0 585      502            152 Sep  9 15:10 442_PCMMTEAMPOSITIONHIST
sftp> quit

VISTA>
```

2.5. Validate Extract Files After FTP

Once the FTP process is complete, run the following programmer prompt to validate checksum:

!md5sum /srv/vista/iro/user/hfs/###_PCMM*

3. SD*5.3*603 – PCMM Web Legacy Changes

> **NOTE: The SD*5.3*603 patch will be installed after the Data Migration team completes the data validation.**

The purpose of the SD*5.3*603 patch is to install the VistA changes needed to support PCMM Web and to remove all user access for the Legacy PCMM GUI. Additionally, The PCMM NIGHTLY TASK job in TaskMan is no longer needed.

3.1. Pre-Requisites Considerations

The following are pre-requisite considerations for the SD*5.3*603 patch installation:

1. The installer must logon to the "back-end" database server, where applicable, to install the SD*5.3*603 patch.

2. The installer must have access to the Caché (M) command line (programmer prompt).

3. The installer must have the XUMGR security key to create the application proxy user record properly. Also XUPROGMODE and XUAUDITING security keys.

4. The installer should turn on terminal logging to assist in possible trouble-shooting.

5. SD*5.3*603 patch may be installed with users on the system and may take 15-20 minutes to install. However, one background process could take several hours to install. A MailMan Message will be sent after the installation is complete.

6. There are several manual post-installation steps to complete. Ensure to follow the steps below.

7. Only the following sites need to perform the Standard Position Cleanup step detailed in the Post-Installation Instructions.

   501 – NEW MEXICO HCS
   512 – BALTIMORE MD VAMC
   528 – UPSTATE NEW YORK HCS
   548 – WEST PALM BEACH VAMC
   558 – DURHAM VAMC
   590 – HAMPTON (VAMC)
   598 – CENTRAL ARKANSAS HCS
   614 – MEMPHIS VAMC
   644 – PHOENIX VAMC
   679 – TUSCALOOSA

3.2. Pre-Installation Instructions

1. Logon to the "back-end" database (i.e., ecp) server to install the SD*5.3*603 patch.

2. Turn on terminal logging to assist in possible trouble-shooting.

3. Assign the XUMGR, XUAUDITING, and XUPROGMODE security keys if not assigned.

4. Determine space requirements for backup of PCMM globals.

5. Backup the globals containing PCMM files. Install globals during non-peak hours.

6. If auditing is ON for the Outpatient Encounter (409.68) file, complete the following:
    a. Note which fields are being audited.
    b. Turn auditing OFF.

3.2.1. Assign XUMGR Security Key

Assign XUMGR security key to the user (New Person File) that installs the SD*5.3*603 patch, following site procedures for Security Key installations. This key is required to create the application proxy user record.

```
Use the Menu Management option:


        Core Applications ...
        Device Management ...
   FM   VA FileMan ...
        Manage MailMan ...
        Menu Management ...
        Programmer Options ...
        Operations Management ...
        Information Security Officer Menu ...
        Taskman Management ...
        User Management ...
   HL7  HL7 Main Menu ...
   VDEF VDEF Configuration and Status ...
        Application Utilities ...
        Capacity Planning ...
        FileMan Access for the OIG ...


Select Systems Manager Menu <TEST ACCOUNT> Option: Menu Management


        Edit options
        Key Management ...
        Secure Menu Delegation ...
        Restrict Availability of Options
        Option Access By User
        List Options by Parents and Use
        Fix Option File Pointers
        Help Processor ...
   OPED Screen-based Option Editor
        Display Menus and Options ...
        Menu Rebuild Menu ...
        Out-Of-Order Set Management ...
        See if a User Has Access to a Particular Option
        Show Users with a Selected primary Menu


Select Menu Management <TEST ACCOUNT> Option: 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 <TEST ACCOUNT> Option: <mark>Allocation of Security Keys</mark>

Allocate key: <mark>XUMGR</mark>   enter the security key name

Another key:

Holder of key: <mark><User Name></mark>   enter the user's name

Another holder:

You've selected the following keys:

XUMGR

You've selected the following holders:

<User Name>

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

XUMGR being assigned to:
    <User Name>

3.2.2. Determine Extract File Space Requirement

Use the following information to determine how much disk space will be required to store the PCMM extract files.

Extract File Name	Source Global Name	Extract Record Size
site_PCMMPATIENTTEAMASSIGNMENT.TXT	^SCPT(404.42,	135
site_PCMMPATIENTTEAMPOSITIONASSIGNMENT.TXT	^SCPT(404.43,	109
site_PCMMTEAM.TXT	^SCTM(404.51,	117
site_PCMMPOSITIONASSIGNMENTHISTORY.TXT	^SCTM(404.52,	114
site_PCMMPRECEPTORASSIGNMENTHISTORY.TXT	^SCTM(404.53,	141
site_PCMMTEAMPOSITION.TXT	^SCTM(404.57,	200
site_PCMMTEAMHISTORY.TXT	^SCTM(404.58,	65
site_PCMMTEAMPOSITIONHISTORY.TXT	^SCTM(404.59,	73

Run the following commands to determine the record count for each file at the site. The number in red is the record count in each file.

```
CHEYL12>D ^%G

Device:
Right margin: 80 =>
Screen size for paging (0=nopaging)? 24 =>
For help on global specifications DO HELP^%G
Global ^SCPT(404.42,0 -- NOTE: translation in effect
^SCPT(404.42,0)="PATIENT TEAM ASSIGNMENT^404.42PIA^77123^76507"

Global ^SCPT(404.43,0 -- NOTE: translation in effect
^SCPT(404.43,0)="PATIENT TEAM POSITION ASSIGNMENT^404.43PI^84688^83574"

Global ^SCTM(404.51,0 -- NOTE: translation in effect
^SCTM(404.51,0)="TEAM^404.51^1061^1059"

Global ^SCTM(404.52,0 -- NOTE: translation in effect
^SCTM(404.52,0)="POSITION ASSIGNMENT HISTORY^404.52PIA^2316^1972"

Global ^SCTM(404.53,0 -- NOTE: translation in effect
^SCTM(404.53,0)="PRECEPTOR ASSIGNMENT HISTORY^404.53PIA^156^146"

Global ^SCTM(404.57,0 -- NOTE: translation in effect
^SCTM(404.57,0)="TEAM POSITION^404.57IA^5544^5479"

Global ^SCTM(404.58,0 -- NOTE: translation in effect
^SCTM(404.58,0)="TEAM HISTORY^404.58PIAO^1079^1076"

Global ^SCTM(404.59,0 -- NOTE: translation in effect
^SCTM(404.59,0)="TEAM POSITION HISTORY^404.59PIA^5364^5301"
```

To determine the size requirements, multiply the record count by the record size for each file. Add these totals together and then add 25%. The result should be the approximate disk space (in bytes) required for the local storage of the extract files. (For example, divide by 1024 for KB; 1,048,576 for MB.)

3.2.3. Backup PCMM Files

```
Caché (M) command line:

VISTA>DO ^%GO

Global output
Device: <directory name>pcmmBKUPS.gbl

Parameters? "WNS" =>
Description (^ for self-loading): PCMM VistA Files

All Globals? No => No
Global ^SCPT
Global ^SCTM
Global ^
2 globals selected from 456 available globals.
SCPT      SCTM
2 globals written
VISTA>
```

3.2.4. Check Audited Fields

Before installing the SD*5.3*603 patch, verify if any fields are audited in the Outpatient Encounter File and then turn off auditing. If auditing occurs, the Outpatient Encounter File consumes a large amount of disk space when creating a new ACOD index on the file.

```
VISTA>D P^DI

VA FileMan 22.0

Select OPTION: ??

   Choose from:
   1         ENTER OR EDIT FILE ENTRIES
   2         PRINT FILE ENTRIES
   3         SEARCH FILE ENTRIES
   4         MODIFY FILE ATTRIBUTES
   5         INQUIRE TO FILE ENTRIES
   6         UTILITY FUNCTIONS
   7         OTHER OPTIONS
   8         DATA DICTIONARY UTILITIES
   9         TRANSFER ENTRIES

Select OPTION: 7  OTHER OPTIONS
Select OTHER OPTION: ??

   Choose from:
   1         FILEGRAMS
   2         ARCHIVING
   3         AUDITING
   4         SCREENMAN
   5         STATISTICS
   6         EXTRACT DATA TO FILEMAN FILE
   7         DATA EXPORT TO FOREIGN FORMAT
   8         IMPORT DATA
   9         BROWSER

Select OTHER OPTION: 3  AUDITING
Select AUDIT OPTION: ??

   Choose from:
   1         FIELDS BEING AUDITED
   2         DATA DICTIONARIES BEING AUDITED
   3         PURGE DATA AUDITS
   4         PURGE DD AUDITS
   5         TURN DATA AUDIT ON/OFF

Select AUDIT OPTION: 1  FIELDS BEING AUDITED
 START WITH WHAT FILE: NEW PERSON// 409.68  OUTPATIENT ENCOUNTER
                                  (4385969 entries)
     GO TO WHAT FILE: OUTPATIENT ENCOUNTER//
```

> **NOTE: If any fields are being audited, a list will display. If no fields are displayed, skip the steps below.**

```
Select AUDIT OPTION:
```

Example:
In this example, the two fields used to create the Outpatient Encounters ACOD index have auditing
turned on.

```
Select AUDIT OPTION: 1  FIELDS BEING AUDITED
 START WITH WHAT FILE: OUTPATIENT ENCOUNTER//
     GO TO WHAT FILE: OUTPATIENT ENCOUNTER//
DEVICE:   HOME  (CRT)    Right Margin: 80//
AUDITED FIELDS                                SEP 22,2014  17:52    PAGE 1
FILE        NUMBER    LABEL                 TYPE            AUDIT


409.68      .02       PATIENT               POINTER         YES, ALWAYS
409.68      .07       CHECK OUT PROCESS CO  DATE/TIME       EDITED OR DELETED

Select AUDIT OPTION:
```

Make note of the field(s) and audit value(s) to reference when turning auditing back on after the ACOD
index completed MailMan message is received.

```
Turn off auditing

Select AUDIT OPTION: 5  TURN DATA AUDIT ON/OFF
AUDIT FROM WHAT FILE: OUTPATIENT ENCOUNTER//
Select FIELD: .02  PATIENT    y
AUDIT: y// NO


Select FIELD: .07  CHECK OUT PROCESS COMPLETION   e
AUDIT: e// NO



Select FIELD:


Select AUDIT OPTION: 1  FIELDS BEING AUDITED
 START WITH WHAT FILE: OUTPATIENT ENCOUNTER//
     GO TO WHAT FILE: OUTPATIENT ENCOUNTER//


Select AUDIT OPTION:
```

3.3. Installation Overview

- Download SD_53_603.KID file from secure FTP site. The PCMM Implementation Team will
  provide the site URL and credentials.
- The pre-installation routine will delete the current Standard Position reference file. A new gold
  version will be created by this installation. The pre-installation routine will be automatically deleted
  when the install is completed.
- The main installation will update routines, data dictionaries, options, and remote procedure
  definitions as detailed in the patch description.

- The post-installation routine will:
  - Add or update HWSC server and web service file entries.
  - Add the application proxy user.
  - Convert Patient Team Position Assignment: Status (404.43/.12) from NA to IU. The installation process may pause while this is performed.
  - Un-schedule the legacy PCMM Nightly Task from TaskMan.
  - Place PCMM Legacy Menus out-of-order.
  - Change SCMC PCMM GUI WORKSTATION to SCMC PCMMR WEB USER MENU. The installation process may pause while this is performed.
  - Build the new C cross reference for Patient Team Position Assignment file.
  - Build the new ACOD index for the Outpatient Encounters file. This will be submitted to TaskMan. A MailMan message is sent after the completion of this process.
  - Delete the trigger (FTEXR) on Position Assignment History File (404.52): FTE Equivalent (.09).
  - Create missing ACOD index records in the Outpatient Encounters file
  - Add two records to the Team Purpose file – PRIMARY CARE - NVCC and PRIMARY CARE – HBPC.

NOTE: Depending on the file size and system, building the ACOD index may take an extended time to complete.

Build Outpatient Encounter ACOD Index		
Site	Record Count	Time (h:m:s)
Memphis	22,874,707	~ 1:30:00
Iron Mountain	6,685,573	0:06:08
Portland	24,849,833	11:37:19
Greater L.A.	44,078,860	5:40:02

3.4. Installation Instructions

This patch is a part of a phased, coordinated process for deploying PCMM Web. The site will be contacted by the PCMM Web Implementation Team and given credentials to the secure FTP site. The file can then be downloaded to the site.

File Name	Contents	Retrieval Format
SD_53_603.KID	KIDS Build	ascii

1. Download the SD_53_603.KID file.

2. From the **Kernel Installation and Distribution System Menu**, select the **Installation Menu**, then the **Load a Distribution** option. At this prompt: Enter a Host File: enter the directory name and file name of the KIDS file;

   Example: user$:[temp]SD_53_603.KID

   Respond **YES** when prompted to continue

3. From this **Kernel Installation and Distribution System Menu**, you may also select to use the following options.

   a. **Verify Checksums in Transport Global** – This option will allow you to ensure the integrity of the routines that are in the transport global.
   b. **Compare Transport Global to Current System** – This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (i.e., routines, DDs, templates, etc.).
   c. **Backup a Transport Global** – This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.

4. From the **Kernel Installation and Distribution System Menu**, select the **Install Package(s)** option and choose the patch to install. **Enter SD*5.3*603**.

5. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//' respond **NO**.

6. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//' respond **NO**.

7. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' respond **NO**.

8. If prompted 'Delay Install (Minutes): (0 – 60): 0//' respond **0**.

3.5. Post-Installation Instructions

1. Validate Application Proxy User.
2. Standard Position Cleanup, if applicable.
3. If auditing was turned OFF for the Outpatient Encounter (409.68) file during Pre-Installation and the MailMan message is received for the ACOD index build, turn auditing ON for the fields that were being audited.
4. The CPRS PC Details web service requires a username and password. Update the Web Service Configuration.
5. Email the PCMM Web development team once the Patch SD*5.3*603 installation is complete. Please note the site information in the body of your e-mail. The PCMMR team e-mail address is:

   pcmmr.team@va.gov

3.5.1. Validate Application Proxy User

Verify the application proxy user was created correctly using FileMan. Verify one Secondary Menu Options – SCMC PCMMR APP PROXY MENU, and User Class – APPLICATION PROXY (shown below) are included.

```
VISTA>DO P^DI

Select OPTION: INQUIRE TO FILE ENTRIES

OUTPUT FROM WHAT FILE: NEW PERSON//
Select NEW PERSON NAME: SCMC,APPLICATION PROXY
ANOTHER ONE:
STANDARD CAPTIONED OUTPUT? Yes//   (Yes)
```

```
Include COMPUTED fields:  (N/Y/R/B): NO// BOTH Computed Fields and Record
Number (IEN)
DISPLAY AUDIT TRAIL? No//   NO

NAME: SCMC,APPLICATION PROXY
  DATE ENTERED: FEB 27, 2014        CREATOR: INNIS,JOHN
SECONDARY MENU OPTIONS: SCMC PCMMR APP PROXY MENU
  TIMESTAMP: 63278,58937
User Class: APPLICATION PROXY        ISPRIMARY: Yes
  PSIM UPDATE USER: INNIS,JOHN      PSIM UPDATE DT: FEB 27, 2014@15:49:11
  PROVIDER KEY ©: 0
```

3.5.2. Standard Position Cleanup

ONLY the following sites listed below need to complete the standard position cleanup steps:

> 501 – NEW MEXICO HCS
> 512 – BALTIMORE MD VAMC
> 528 – UPSTATE NEW YORK HCS
> 548 – WEST PALM BEACH VAMC
> 558 – DURHAM VAMC
> 590 – HAMPTON (VAMC)
> 598 – CENTRAL ARKANSAS HCS
> 614 – MEMPHIS VAMC
> 644 – PHOENIX VAMC
> 679 – TUSCALOOSA

NOTE: Only run this routine once, per site listed above. If the routine needs to run again, first restore the backup of the original global. This process will log records changed in the ^XTMP("SCMCFPOS") global and retained for 1 year.

If a site other than listed above runs the routine, no changes will occur.

Steps:

1. Backup the global:

```
VISTA>DO ^%GOGEN
Device: <directory name>teampositionbkup.gbl
Parameter"? ""NS" =>
Warning:  Use"a""V" format to avoid problems with control characters.
Global ^SCTM(404.57
Global ^
VISTA>
```

2. Run the cleanup routine.

NOTE: It is very important to notify the Implementation Manager if this step fails for any reason.

```
VISTA>DO EN^SCMCFPOS
```

```
VISTA>
```

3. Delete this routine (SCMCFPOS) upon successful installation of this patch.

3.5.3. Turn Auditing On (If Applicable)

If auditing was turned off before this patch was installed, follow steps below to turn it back on. If auditing was not turned on, skip the step below and continue to the 8.5.5 PCMM Web Application Installation section.

After receiving the MailMan message that the ACOD Index build has completed, auditing may be turned back on for the fields that were turned off above.

```
For the "Select FIELD:" prompt(s) enter the field(s) made note of above.
For the "AUDIT:" prompt(s) enter the value(s) made note of above.

Select AUDIT OPTION: 5   TURN DATA AUDIT ON/OFF
AUDIT FROM WHAT FILE: OUTPATIENT ENCOUNTER//
Select FIELD: .02   PATIENT    n
AUDIT: n// YES, ALWAYS


Select FIELD: .07   CHECK OUT PROCESS COMPLETION    n
AUDIT: n// EDITED OR DELETED


Select FIELD:


Select AUDIT OPTION:
```

3.5.4. Add Web Service Username and Password

Follow these steps to add a username and password to the web service configuration. The password will be supplied by the Implementation Manager.

```
VISTA>D ^XUP

Setting up programmer environment
This is a TEST account.

Terminal Type set to: C-VT320

Select OPTION NAME: XOBW WEB SERVER MANAGER        Web Server Manager
Web Server Manager


Web Server Manager            Mar 02, 2015@16:58:15        Page:    1 of    1
                    HWSC Web Server Manager
                    Version: 1.0      Build: 31


ID    Web Server Name          IP Address or Domain Name:Port
 1    *PCMMR                    vaww-pcmm.cc.med.va.gov:80
 2    *PCMMR TEST               10.208.148.71:10100
```

```
         Legend:  *Enabled
AS  Add Server                      TS  (Test Server)
ES  Edit Server                     WS  Web Service Manager
DS  Delete Server                   CK  Check Web Service Availability
EP  Expand Entry                    LK  Lookup Key Manager
Select Action:Quit// ES   Edit Server
Select Web Server:  (1-2): 1
NAME: PCMMR//
SERVER: vaww-pcmm.cc.med.va.gov//
PORT: 80//
DEFAULT HTTP TIMEOUT: 30//
STATUS: ENABLED//

Security Credentials
====================
LOGIN REQUIRED: NO// y   YES
USERNAME: CPRSClient
Want to edit PASSWORD (Y/N): y

Enter a new PASSWORD: *******

Please re-type the new password to show that I have it right: *******

Ok, password has been changed!

SSL Setup
=========
SSL ENABLED: FALSE//

Authorize Web Services
======================
Select WEB SERVICE: PCMM-R GET PC INFO REST//
  WEB SERVICE: PCMM-R GET PC INFO REST//
  STATUS: ENABLED//
Select WEB SERVICE:



Web Server Manager        Mar 02, 2015@16:52:24        Page:    1 of    1
                    HWSC Web Server Manager
                  Version: 1.0      Build: 31


ID    Web Server Name          IP Address or Domain Name:Port
 1    *PCMMR                    vaww-pcmm.cc.med.va.gov:80
 2    *PCMMR TEST               10.208.148.71:10100



         Legend:  *Enabled
AS  Add Server                      TS  (Test Server)
ES  Edit Server                     WS  Web Service Manager
DS  Delete Server                   CK  Check Web Service Availability
EP  Expand Entry                    LK  Lookup Key Manager
Select Action:Quit// Q
```

3.5.5. PCMM Web Application Installation

> **NOTE: Complete the steps below once the Data Migration is validated and completed and the PCMM Web application is ready to go live in site's environment.**
>
> **Ensure you received notification from the Implementation Manager before proceeding with this step.**

- You may install in the test environment per requirements at the site; however, test instances of CPRS may no longer display PCMM data correctly.
- Do not install into Production until the Implementation Manager has provided sign off.

3.5.6. Delete Post Installation Processing Routines

The following routines should be deleted after SD*5.3*603 has been successfully installed:

- SD53P603
- SCMCOPT
- SCMCFPOS

3.5.7. Install OR*3.0*387

Pre-Requisites:
- Once the Implementation Manager has approved the installation of Patch OR*3.0*387, ensure all other deployments have been executed.

3.5.8. Remove Legacy PCMM GUI from User Computers

The IRM office should coordinate the removal of the Legacy PCMM GUI from user workstations.

3.5.9. Recovery Steps

If there are problems encountered during the "go-live" process, some recovery steps have been automated.

Restore PCMM Files

> **NOTE: Restore PCMM Files only if errors occur with the installation of PCMM in a live environment.**

```
Caché (M) command line:

VISTA>DO ^%GI

Global input

Device: <directory name>pcmmBKUPS.gbl
Parameters? "RS" =>
Globals were saved on 11 Aug 2014   3:26 PM   Cache
with description: PCMM VistA Files
```

```
Input option: A
^SCPT    ^SCTM
VISTA>
```

Re-Run Standard Position Cleanup

If needed, re-run the Standard Position Cleanup.

```
Restore the file from the backup global.

VISTA>DO ^%GIGEN

Device: <directory name>teampositionbkup.gbl
Parameters? "R" =>
Transfer entire set of files?  No=> y
Transferring files on Aug 06 2014 at 12:48 PM
From global ^SCTM(404.57
To global ^SCTM(404.57

Transfer completed
Done for this set of files.
VISTA>

Delete the ^XTMP("SCMCFPOS") global.

VISTA>KILL ^XTMP("SCMCFPOS")
VISTA>

Rerun the cleanup routine.

VISTA>DO EN^SCMCFPOS
VISTA>
```

Remove PCMM Legacy Menus Out of Order

```
VISTA>DO RESTORE^SCMCOPT
VISTA>
```

Restore Legacy Broker Menu to Users

```
VISTA>DO RESTMENU^SCMCOPT
VISTA>
```

4. Patch OR*3.0*387 – PCMM Web Team Display Enhancements to CPRS

Patch OR*3.0*387 allows CPRS to retrieve the patient's team and provider assignments from PCMM Web.

NOTE: Wait to install this patch on the site's Production System until PCMM Web is ready to "go live." You will receive notification from the Implementation Manager when it is ok to proceed. PCMM Web features in CPRS (PCMM summary header and PCMM details popup window) will not function properly without a live PCMM Web system.

Patch OR*3.0*387 may be installed on test systems after SD*5.3*603 is installed.

4.1. Installation Overview

Patch OR*3.0*387 will install one routine and two RPC definitions. There are no unique instructions for either pre or post-installation. This patch may be installed with users on the system although it is recommended that the patch be installed during non-peak hours to minimize potential disruption to users. This patch should take less than 1 minute to install.

4.2. Pre-Installation Instructions

Ensure to install patch SD*5.3*603 first. Wait to install OR*3.0*387 until directed by the PCMM Web Implementation Team. CPRS PCMM functionality will not execute properly without a live PCMM Web system.

4.3. Installation Instructions

This patch will install one routine and two RPC definitions.

The VistA software for this patch is released as a KIDS host file. It may be downloaded from a secured FTP site as directed by the PCMM Web Implementation Team. The software distribution includes:

File Name	Contents	Retrieval Format
OR_30_387.KID	KIDS Build	ascii

1. Download the OR_30_387.KID file.

2. From the Kernel Installation and Distribution System Menu, select the Installation Menu, then the **Load a Distribution** option. When prompted for the Host File, enter **<directory>OR_30_387.KID**, then when prompted to "Continue with Load" (twice), respond **YES**.

3. From the Installation Menu, you may also select the following options. When prompted for the INSTALL NAME, enter the patch **OR*3.0*387**.

  a. Verify Checksums in Transport Global - This option will allow you to ensure the integrity of the routines that are in the transport global.

  b. Compare Transport Global to Current System - This option will allow you to view all changes that will be made when this patch is installed. It compares all components of this patch (routines, DDs, templates, etc.).

  c. Backup a Transport Global - This option will create a backup message of any routines exported with this patch. It will not backup any other changes such as DDs or templates.

1. From the Installation Menu, select the Install Package(s) option and choose the patch to install. Enter **OR*3.0*387**.

2. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of Install? NO//' respond **NO**.

3. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//' respond **NO**.

4. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//' respond **NO**.

5. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond **0**.

4.4. Post-Installation Instructions

No post-installation instructions needed.

5. Patches WEB 1*1 and WEB 1*2 Installation

The WEB 1*1 and WEB 1*2 patches are informational only patches and have no associated VistA software. The software associated with WEBP*1*1 and WEBP*1*2 are for the PCMM Web application. The PCMM Web application is installed on one or more servers in a VA data center.

6. PCMM Web VistA Patch Rollback

1. To rollback a VistA patch, choose and execute the "Backup a Transport Global" on the Patch Installation Menu. This option will create a MailMan Message containing a backup of all current routines that will be replaced by the patch install.

  An example of the message subject:

```
Backup of <patch name> install on MMM DD, YYYY
```

6.1. Patch SD*5.3*603

For patch **SD*5.3*603,** PCMM Web will keep the data synchronized with VistA; there should not be a need to restore data on VistA.

2. The following routines would need to be restored from the Backup Transport Global MailMan message:

  SCAPMC23
  SCMCDD1

```
SCMCMHTC
SCMCTSK
SCMCTSK2
SCMCTSK5
SCMCTSK6
SDCOU
```

Note: The other routines in the patch were written specifically for PCMM Web. They may be deleted.

3. Refer to Section 3.5.9 Recovery Steps for detailed steps on reverting some of the changes made by the patch, specifically, Remove PCMM Legacy Menus Out of Order and Restore Legacy Broker Menu to Users.

4. Changes to Fileman Data Dictionaries can be restored from a system backup, or a subsequent patch. The files that are changed are documented in the patch description.

5. Changes to the Standard Position (#403.46) file may remain.

6. Any other changes made by this patch can be remediated by a subsequent patch.

6.2. Patch SD*5. 3*620

The routines and menu options released in this patch are for one-time data extracts used for data migration. No rollback is required. The released M routines and Menu Options may be deleted from the target system

6.3. Patch OR*3.0*387

Restore the one routine (ORWPT1) from the Backup Transport Global Mailman message. Changes to revert the two RPC definitions (ORWPT1 PRCARE and ORWPT1 PCDETAIL) would have to be done manually or in a subsequent new patch.

6.4.WEBP*1*1

 Informational patch, no VistA rollback required.

6.5.WEBP*1*2

Informational patch, no VistA rollback required.

6.6.Additional Information and Example

Backing Up Transport Globals

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

Example of Backup Transport Global and Restoring Routines to Pre-Patch Version

```
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       This step needs to be done before
installing the patch, as documented in the Installation Guide.
   6      Install Package(s)
          Restart Install of Package(s)
          Unload a Distribution



You have PENDING ALERTS
          Enter  "VA to jump to VIEW ALERTS option

Select Installation <TEST ACCOUNT> Option: BAckup a Transport Global
Select INSTALL NAME:    PRCA*4.5*301     Loaded from
Distribution    10/7/15@19:
42:49
    => Treasury Cross-Servicing Program  ;Created on Oct 05, 2015@13:38:56

This Distribution was loaded on Oct 07, 2015@19:42:49 with header of
   Treasury Cross-Servicing Program  ;Created on Oct 05, 2015@13:38:56
   It consisted of the following Install(s):
   PRCA*4.5*301
Subject: Backup of PRCA*4.5*301 install on Oct 07, 2015
  Replace
Loading Routines for PRCA*4.5*301.........................................
Send mail to: BRICKER,DENNIS//   BRICKER,DENNIS
Select basket to send to: IN//
And Send to:
```

```
     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


DEVISC1A1:DEVVOO>D ^XM


VA MailMan 8.0 service for BRICKER.DENNIS@DEVVOO.FO-ALBANY.MED.VA.GOV
You last used MailMan: 10/05/15@14:27
You have no new messages.


Select MailMan Option: READ/MANAGE MESSAGES

Select message reader: Classic//
Read mail in basket: IN//        (1 message)
Last message number: 1   Messages in basket: 1
Enter ??? for help.


IN Basket Message: 1//
```

<mark>Subj: Backup of PRCA*4.5*301 install on Oct 07, 2015 [#135901]
10/07/15@19:43</mark>

```
6470 lines
From: BRICKER,DENNIS  In 'IN' basket.   Page 1
--------------------------------------------------------------------------
--
$TXT PACKMAN BACKUP Created on Wednesday, 10/7/15 at 19:43:23 by
BRICKER,DENNIS
at DEVVOO.FO-ALBANY.MED.VA.GOV
$ROU PRCAAPR1 (PACKMAN_BACKUP)
PRCAAPR1 ;WASH-ISC@ALTOONA,PA/RGY - PATIENT ACCOUNT PROFILE ;2/12/97  11:48
AM
;;4.5;Accounts
Receivable;**34,45,108,143,141,206,192,218,276,275,284,301**;Ma
r 20, 1995;Build 101
;;Per VA Directive 6402, this routine should not be modified.
HDR ;Head for Account profile
S X="",$P(X,"=",23)="" W @IOF,!,X,"   A c c o u n t   P r o f i l e   ",X
HDR1 N DMC,IBRX,RSN,TOP4,TOP6,DPTFLG,ACCTNUM,RCCV
S IBRX=0,DPTFLG=0
;
;Display new 'Statement Account Number" (Patch 206)
I PRCADB["DPT(" S DPTFLG=1,ACCTNUM=$$ACCT(PRCADB)
;
W !,$P(DEBT,"^",2) I DPTFLG!(PRCADB["VA(200,") S
X=$S(PRCADB["DPT(":$P(^DPT(+P
```

```
RCADB,0),"ˆ",9),1:$P($G(ˆVA(200,+PRCADB,1)),"ˆ",9)) W " (",$E(X,1,3),"-
",$E(X,4
,5),"-",$E(X,6,9),")"

Enter RETURN to continue or 'ˆ' to exit: ˆ

Enter message action (in IN basket): Ignore// ?

Enter a code from the list.

B       Backup                      Q       Query
BR      Print to the Browser        Q xxx   Query recipient(s) xxx
C       Copy                        QC      Query Current
D       Delete                      QD      Query Detailed
E       Edit                        QN      Query Network
F       Forward                     QNC     Query Not Current
H       Headerless Print            QT      Query Terminated
HG      Help:Group Information      R       Reply
HU      Help:User Information       RI      Reply and Include responses
I       Ignore                      S       Save
IN      Information only            T       Terminate
L       Later                       V       Vaporize date edit
N       New                         W       Write
P       Print                       X       Xtract PackMan

Enter message action (in IN basket): Ignore// Xtract PackMan
Select PackMan function: ?
    Answer with PackMan function NUMBER, or NAME
    Choose from:
    1           ROUTINE LOAD
    2           GLOBAL LOAD
    3           PACKAGE LOAD
    4           SUMMARIZE MESSAGE
    5           PRINT MESSAGE
    6           INSTALL/CHECK MESSAGE
    7           INSTALL SELECTED ROUTINE(S)
    8           TEXT PRINT/DISPLAY
    9           COMPARE MESSAGE

Select PackMan function:
```

7. Appendix A – Patch Description WEB*1*1

```
=============================================================================
Run Date: NOV 05, 2015                      Designation: WEBP*1*1
Package : PATIENT CENTERED MANAGEMENT MODULEPriority   : MANDATORY
Version : 1                                  Status     : COMPLETE/NOT RELEASED
=============================================================================

Subject:  PATIENT-CENTERED MANAGEMENT MODULE (PCMM) WEB

Category:  INFORMATIONAL

Description:
===========

This is the informational patch for the release of the new
Patient-Centered Management Module (PCMM) Web application.

RELEASE INFORMATION:
PCMM Web is a portlet that runs inside the Clinical Information Support
System (CISS) portal.  The Clinical Information Support System (CISS) is
a web-based portal application that provides a central interface for
users to access information and applications necessary for their role.
The applications accessed through CISS are called partner systems.  PCMM
Web is a partner system to CISS.

In order to fully support a team based, patient-centric approach to
healthcare delivery, enhancements to PCMM have been developed which allow
a team to be formed and aligned around a patient. These, include
providers residing in multiple VA sites and in non-VA settings to enable
care coordination and communication.   The software supports automated
data collection for management metrics and analysis related to access,
workload, and panel management.  VHA's model of team-based care is known
as the Patient-Aligned Care Team (PACT).  The goal is to evolve and
replace existing PCMM software with functionality that identifies all
team members and specialists (VA and non-VA) involved in the care of the
patient, as well as their contact information and provide modalities to
facilitate provider-provider communication.  This new PACT Management
Module is known as PCMM Web.  According to the PCMM Modification
Workgroup, the relationship between the patient and his/her Primary Care
Provider (PCP) will help to enhance patient care and the treatment
process.  Patients who regularly visit the same PCP receive better
healthcare and utilize fewer healthcare resources because of the PCP's
ability to treat patients more efficiently and effectively.

There are three VistA patches associated with release of PCMM Web.  These
patches are required and support PCMM Web interactions with VistA and
CPRS.

SD*5.3*620 - PCMM DATA EXTRACTS
SD*5.3*603 - PCMM WEB LEGACY CHANGES
OR*3.0*387 - PCMM Web TEAM DISPLAY ENHANCEMENTS TO CPRS


SOFTWARE CHANGES:
=================
PCMM Web is a web-based application. Changes will be applied to the
production servers and will be immediately available to the users. No
changes at the local site are required for this release.
```

```
SYSTEM REQUIREMENTS:
====================

SOFTWARE RETRIEVAL:
===================
The PCMM Web application can be accessed directly from Internet Explorer
(IE).  All installations will occur on the single national enterprise web
server.


Test Sites:
----------
Memphis VAMC - Memphis, TN
Iron Mountain VAMC - Iron Mountain MI
VA West Los Angeles HCS  - Los Angeles, CA
Portland VAMC - Portland, OR


Documentation:
--------------


Title                          File Name               FTP Mode
-------------------------------------------------------------------
Installation Guide             SD_53_603_IG.PDF        binary
SD Release Notes               SD_53_603_RN.PDF        binary
User Guide                     SD_53_603_UM.PDF        binary
OR Release Notes               OR_30_387_RN.PDF        binary


Documentation Retrieval Instructions:
-------------------------------------
The files listed above will be obtainable via FTP.  The preferred method
will be to FTP the files from:

    download.vista.med.va.gov


This transmits the files from the first available FTP server.  Sites may
elect to retrieve manuals directly from a specific server as follows:


    CIO FIELD OFFICE        FTP ADDRESS              DIRECTORY


    Albany          ftp.fo-albany.med.va.gov   [anonymous.software]
    Hines           ftp.fo-hines.med.va.gov    [anonymous.software]
    Salt Lake City  ftp.fo-slc.med.va.gov      [anonymous.software]


Documentation can also be found on the VA Software Documentation Library
at:
http://www4.va.gov/vdl/


Patch Installation:

There is no local VistA installation for PCMM Web. All installations will
be done on the national web server.

Supporting VistA patches are required.  See the PCMM Web-VistA
Installation Guide.

ADDITIONAL INFORMATION:
=======================
If you have any questions concerning the implementation of this
```

application, please contact the VA Service Desk at 1-888-596-4357 or
directly log a Remedy ticket via Remedy Requester application using the
category: Applications-HealtheVet-Vista, and type, PCMM Web.

Any changes or impacts to this package/installation will be reported on
this message.

Routine Information:
===================

No routines included.

===
User Information:
  Entered By :   THOMPSON,ANDREW R   Date Entered :   AUG 13,2014
  Completed By: YARLAGADDA,MADHAVI   Date Completed: NOV 5,2015
  Released By :   Date Released :
===

8. Appendix B – Patch Description WEB*1*2

VistA Patch Display   Page: 1
===
Run Date: SEP 24, 2015   Designation: WEBP*1*2 TEST v1
Package : PATIENT CENTERED MANAGEMENT MODULEPriority   : MANDATORY
Version : 1   Status   : UNDER DEVELOPMENT
===

Subject: PATIENT-CENTERED MANAGEMENT MODULE (PCMM) WEB APPLICATION, VERSION 1.1

Category: INFORMATIONAL

Description:
===========

The Patient-Centered Management Module (PCMM) Web application version
WEBP-1.2 provides several upgrades and enhancements for the national
release of PCMM Web.

Enhancements:
=============

NON-VA CARE

Functionality to capture non-va care has been added in WEBP*1*2.
Provide the ability to capture, view, and manage Non-VA Providers that are
providing Non-VA Care (formerly Fee Basis) to the patient through the VA.
Non-VA Care consists of three categories:
 -Veteran's Choice
 -Community Nursing Home
 -Veteran State Home

New Menus in PCMMWeb will allow a user to search for Non-VA Providers

and Non-VA practices. Users will be required to assign a Non-VA Practice
to a Non-VA Provider and then to the patient.

The user is given an option to assign the patient
to a special care type PACT team, "Non-VA Care", to
allow a Care Coordinator to manage the population of patients receiving
Non-VA Care paid for by the VA.

This new functionality also allows a
special tag to appear in the CPRS header "*Click for Non-VA PC*"
indicating that a patient is receiving primary care from a provider in one
of the Non-VA Care categories with a Specialty of "Primary Care." In the
CPRS window, a new tag will appear for these Non-VA Care primary care
assignments by using the tag of "Non-VA PC:" at the bottom of the CPRS
popup window. Only the "Primary Care" Specialty will be indicated in the
CPRS header by using the "*Click for Non-VA PC*" tag.

All other Non-VA provider assignments to patients with other Specialties,
except Primary Care, will only be displayed in the CPRS Window no changes
to current functionality. the current functionality of capturing and
displaying Private Sector and DOD Non-VA Providers is still available to
the user thru the new Non-VA Providers process.

HOME BASED PRIMARY CARE

Provide the ability to remove Home Based Primary Care (HBPC) as a FOCUS
of the care type "Primary Care" and created a new specialty care type of
"Primary Care - HBPC". This care type functions as a special Primary Care
PACT team that will not follow the same validation rules as a Primary
Care PACT team and will have no pending status. Assignment to this care
type will be "Active" automatically without using encounters. A patient
will only be assigned to either a PC PACT team or a PC-HBPC PACT team at
any given time within the same 3 digit station code. This new
functionality allows this special PACT team to display in the CPRS header
the same as for PC PACT teams by indicating the team name and the
assigned PCP and AP, if assigned. In the CPRS window, a new tag will
appear indicating this new care type of "Primary Care - HBPC" by using
the tag of "HBPC:" instead of "PACT:".

Implementation:
===============
The PCMM Web WEBP-1.2 is a centrally managed web-based application and
will be implemented as a one-time installation by the PCMM Technical Team
(HP). PCMM Web 1.1 was installed at four facilities that transitioned to
PCMM Web in its Initial Operating Capability (IOC) stage:
  585 Iron Mountain
  614 Memphis
  648 Portland
  691 West Los Angeles

Implementation Files:
====================
 None

```
Test Sites:
----------
Memphis VAMC - Memphis, TN
Iron Mountain VAMC - Iron Mountain MI
VA West Los Angeles HCS  - Los Angeles, CA
Portland VAMC - Portland, OR



Documentation:
==============
The following documentation is available with the release of PCMM Web
WEBP-1.2:

    PCMM Web WEBP-1.2 User Guide
    PCMM Web WEBP-1.2 Release Notes



Documentation Retrieval Instructions:
-------------------------------------
The files listed above will be obtainable via FTP. The preferred method
will be to FTP the files from:

   download.vista.med.va.gov


This transmits the files from the first available FTP server. Sites may
elect to retrieve manuals directly from a specific server as follows:

   CIO FIELD OFFICE         FTP ADDRESS                  DIRECTORY

   Albany             ftp.fo-albany.med.va.gov   [anonymous.software]
   Hines              ftp.fo-hines.med.va.gov    [anonymous.software]
   Salt Lake City     ftp.fo-slc.med.va.gov      [anonymous.software]


Documentation can also be found on the VA Software Documentation Library
at:
http://www.va.gov/vdl/



Patch Installation:
===================


There is no local VistA installation for PCMM Web. All installations will
be done on the national web server.

ADDITIONAL INFORMATION:
=======================
If you have any questions concerning the implementation of this
application, please contact the VA Service Desk at 1-888-596-4357 or
directly log a Remedy ticket via Remedy Requester application using the
category: Applications-HealtheVet-Vista, and type, PCMM Web.

Any changes or impacts to this package/installation will be reported on
this message.
```

Routine Information:
====================

No routines included.

==
User Information:
  Entered By :   THOMPSON,ANDREW R   Date Entered :   MAR 5,2015
  Completed By: Date Completed:
  Released By :   Date Released :
==

9. Appendix C – Patch Description SD*5.3*620

VistA Patch Display   Page: 1
==
Run Date: JUN 12, 2015   Designation: SD*5.3*620
Package : SCHEDULING   Priority   : MANDATORY
Version : 5.3 SEQ #518   Status   : RELEASED
                        Compliance Date: APR 09, 2015
==

Subject: PCMM WEB DATA EXTRACTS

Category: ROUTINE

Description:
===========

The purpose of this patch is to provide sites with a means to extract
Vista legacy Primary Care Management Module (PCMM) data for comparison to
Patient-Centered Management Module-Web (PCMM Web) for data migration prior
to the implementation of PCMM Web patch SD*5.3*603.

*******************************ATTENTION*******************************
DO NOT run the "SCMC PCMM EXTRACT ROUTINES" listed below until your
site has been scheduled to begin the PCMM data validation and migration
process. Each site will be contacted by the Implementation Manager to
schedule PCMM data validation and migration.
****

Technical Summary
=================
1. Routine SCRPTEAM is a new routine that extracts data from the TEAM
    file (404.51) for comparison to PCMMR data.
2. Routine SCRPTHST is a new routine that extracts data from the TEAM
    HISTORY file (404.58) for comparison to PCMMR data.
3. Routine SCRPTPOS is a new routine that extracts data from the TEAM
    POSITION file (404.57) for comparison to PCMMR data.
4. Routine SCRPTPHS is a new routine that extracts data from the TEAM
    POSITION HISTORY file (404.59) for comparison to PCMMR data.

5. Routine SCRPPTA is a new routine that extracts data from the PATIENT TEAM ASSIGNMENT file (404.42) for comparison to PCMMR data.
6. Routine SCRPPTPA is a new routine that extracts data from the PATIENT TEAM POSITION ASSIGNMENT file (404.43) for comparison to PCMMR data.
7. Routine SCRPPRAH is a new routine that extracts data from the PRECEPTOR ASSIGNMENT HISTORY file (404.53) for comparison to PCMMR data.
8. Routine SCRPPAHS is a new routine that extracts data from the POSITION ASSIGNMENT HISTORY file (404.52) for comparison to PCMMR data.
9. A new security key PCMM DATA EXTRACTS is necessary to run the extract routine options.

Additional Information:

DO NOT run the extract options in this patch until your site has been
scheduled to begin the PCMM data validation and migration process.
Each site will be contacted by the Implementation Manager to schedule
PCMM data validation and migration

Patch Components
================

Files & Fields Associated:
File Name (#)	Field Name (#)	New/Modified/Deleted
N/A		

Forms Associated:
Form Name	File #	New/Modified/Deleted
N/A		

Mail Groups Associated:
Mail Group Name	New/Modified/Deleted
N/A	

Options Associated:
Option Name	Type	New/Modified/Deleted
SCMC PCMM EXTRACT ROUTINES	menu	new
SCMC TEAM FILE EXTRACT	routine	new
SCMC TEAM HISTORY FILE EXTRACT	routine	new
SCMC TEAM POSITION EXTRACT	routine	new
SCMC TEAM POS HISTORY EXTRACT	routine	new
SCMC PAT TEAM ASSIGN EXTRACT	routine	new
SCMC PAT TEAM POS ASGN EXTRACT	routine	new
SCMC POSITION ASSIGN EXTRACT	routine	new
SCMC PRECEPTOR ASSIGN EXTRACT	routine	new

Protocols Associated:
| Protocol Name | New/Modified/Deleted |

```
-------------                    --------------------
N/A

Security Keys Associated:
Security Key Name              New/Modified/Deleted
-----------------              --------------------
PCMM DATA EXTRACTS             new

Remote Procedures Associated:
RPC Name                       New/Modified/Deleted
-------------                  --------------------
N/A

Templates Associated:
Template Name     Type      File Name (#)          New/Modified/Deleted
-------------     ----      -----------------      --------------------
N/A

New Service Requests (NSRs):
-----------------------------
N/A

Patient Safety Issues (PSIs):
-----------------------------
N/A

Remedy Ticket(s) & Overviews:
-----------------------------
N/A

Test Sites:
-----------
Memphis VAMC - Memphis, TN
Iron Mountain VAMC - Iron Mountain, MI
VA West Los Angeles HCS  - Los Angeles, CA
Portland VAMC - Portland, OR

Documentation Retrieval Instructions:
=====================================
Updated documentation describing the new functionality introduced by this
patch is available.

The preferred method is to FTP the files from
ftp://download.vista.med.va.gov/.
This transmits the files from the first available FTP server. Sites may
also elect to retrieve software directly from a specific server as
follows:

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>

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library
```

at: http://www.va.gov/vdl/

```
File Description                 File Name                FTP Mode
-----------------------------------------------------------------------
PCMM Web-VistA Data Extract Guide  SD_53_620_DM.pdf         binary
Release Notes                      SD_53_620_RN.pdf         binary
```

Patch Installation:
===================

Please refer to the PCMM Web-VistA Data Extract Guide for complete
details.

Installation Overview
----

1. DO NOT run the Post Installation instructions in this patch on the
   Production System until your site has been scheduled to begin the PCMM
   Data Mitigation process.
   Each site will be contacted by the PCMM Implementations Manager to
   schedule PCMM Data Mitigation.
2. This patch may be installed with users on the system. This patch
   should take less than 2 minutes to install.
3. The file extract processing may be system resource intensive.
   It is recommended that the Post Installation portion of this patch be
   scheduled for non-peak hours.

Pre-Installation Instructions

No special instructions.

Installation Instructions

This patch will install eight data extract routines, nine menu options,
and one security key.

1. Login to the "backend" database server (i.e. ecp node), if applicable
   to your site.
2. Choose the PackMan message containing this patch.
3. Choose the INSTALL/CHECK MESSAGE PackMan option.
4. From the Kernel Installation and Distribution System Menu, select the
   Installation Menu. From this menu, you may elect to use the following
   options. When prompted for the INSTALL NAME enter SD*5.3*620
   a. Verify Checksums in Transport Global - This option will allow you to
      ensure the integrity of the routines that are in the transport
      global.
   b. Compare Transport Global to Current System - This option will allow
      you to view all changes that will be made when this patch is
      installed. It compares all components of this patch (routines, DDs,
      templates, etc.).
   c. Backup a Transport Global - This option will create a backup message
      of any routines exported with this patch. It will not backup any
      other changes such as DDs or templates.

5. From the Installation Menu, select the Install Package(s) option and
   choose the patch to install. Enter SD*5.3*620
6. When prompted 'Want KIDS to Rebuild Menu Trees Upon Completion of
   Install? NO//' respond NO
7. When prompted 'Want KIDS to INHIBIT LOGONs during the install? NO//'
   respond NO
8. When prompted 'Want to DISABLE Scheduled Options, Menu Options, and
   Protocols? NO//' respond NO
9. If prompted 'Delay Install (Minutes): (0 - 60): 0//' respond 0.

Post-Installation Instructions (to be executed once site is scheduled for
PCMM Web Data Mitigation)

Please refer to the PCMM Web-VistA Data Extract Guide for complete
details.

NOTE: DO NOT run the extract options on the Production system until your
site has been scheduled to begin the PCMM Data Mitigation process.
Extract options may be run in test accounts to verify functionality,
however, the FTP step should not be run in the test account.

Each site will be contacted by the Implementation Manager to schedule
PCMM Data Mitigation.

Routine Information:
====================

The second line of each of these routines now looks like:
 ;;5.3;Scheduling;**[Patch List]**;AUG 13, 1993;Build 11

The checksums below are new checksums, and
 can be checked with CHECK1^XTSUMBLD.

Routine Name: SCRPPAHS
    Before: n/a After: B22427775 **620**
Routine Name: SCRPPRAH
    Before: n/a After: B13384637 **620**
Routine Name: SCRPPTA
    Before: n/a After: B18005623 **620**
Routine Name: SCRPPTPA
    Before: n/a After: B20107233 **620**
Routine Name: SCRPTEAM
    Before: n/a After: B15183519 **620**
Routine Name: SCRPTHST
    Before: n/a After: B8383528 **620**
Routine Name: SCRPTPHS
    Before: n/a After: B9381464 **620**
Routine Name: SCRPTPOS
    Before: n/a After: B35911981 **620**

===

User Information:
  Entered By :   SANDUSKY,DONNA   Date Entered :   MAY 15,2014
  Completed By: YARLAGADDA,MADHAVI Date Completed: JAN 6,2015
  Released By :   BARFIELD,RICHARD   Date Released :   MAR 10,2015
==

10. Appendix D – Patch Description SD*5.3*603

VistA Patch Display   Page: 1
==
Run Date: NOV 05, 2015   Designation: SD*5.3*603
Package : SCHEDULING   Priority   : MANDATORY
Version : 5.3   Status   : COMPLETE/NOT RELEASED
==

Associated patches: (v)SD*5.3*107 <<= must be installed BEFORE `SD*5.3*603'
                    (v)SD*5.3*526 <<= must be installed BEFORE `SD*5.3*603'
                    (v)SD*5.3*539 <<= must be installed BEFORE `SD*5.3*603'
                    (v)SD*5.3*575 <<= must be installed BEFORE `SD*5.3*603'
                    (v)SD*5.3*581 <<= must be installed BEFORE `SD*5.3*603'

     Subject: PCMM WEB LEGACY CHANGES

     Category: DATA DICTIONARY
               ROUTINE
               ENHANCEMENT
               OTHER
               SORT TEMPLATE

Description:
===========

This patch implements changes to VistA required to support the new
Patient-Centered Management Module (PCMM) Web. There is a companion CPRS
patch (OR*3.0*387) that implements changes to Remote Procedure Calls (RPC)
required to display content for the Primary Care Header and Detail Window.

This patch is a part of a phased, coordinated process for deploying PCMM
Web. The VistA software for this patch and the companion OR*3.0*387
patch is released as two KIDS host files. They may be downloaded from a
secured ftp site as directed by the PCMM Web Implementation Team.

****
DO NOT INSTALL THIS PATCH ON A PRODUCTION SYSTEM UNTIL NOTIFIED BY
THE PCMM WEB IMPLEMENTATION MANAGER.
****

In order to fully support a team based, patient-centric approach to
healthcare delivery, enhancements to PCMM have been developed to allow a
team to be formed and aligned around a patient, including providers across
multiple VA sites and in non-VA settings to enable care coordination and
communication. The software supports automated data collection for
management metrics and analysis related to access, workload, and panel
management. VHA's model of team-based care is known as the

Patient-Aligned Care Team (PACT). The goal is to evolve and replace
existing PCMM software with functionality that identifies all team members
and specialists (VA and non-VA) involved in the care of the patient, as
well as their contact information and provide modalities to facilitate
provider-provider communication. This new PACT Management Module is known
as PCMM Web. According to the PCMM Modification Workgroup, the
relationship between the patient and his/her Primary Care Provider (PCP)
will help to enhance patient care and the treatment process. Patients who
regularly visit the same PCP receive better healthcare and utilize fewer
healthcare resources because of the PCP's ability to treat patients more
efficiently and effectively.

Most of the changes to VistA are to background processing that will not
be visible to users. An Application Proxy user was created to support
batch processing for reading and updating VistA files.

TECHNICAL SUMMARY:
==================

Files

STANDARD POSITION (#403.46) file - Several position names were changed and
new positions were added.
Name change
  TEAM PHARMACIST to PACT CLINICAL PHARMACIST
  DIETITIAN to REGISTERED DIETITIAN
  OIF OEF CLINICAL CASE MANAGER to TCM CLINICAL CASE MANAGER
  OIF OEF PROGRAM MANAGER to TCM PROGRAM MANAGER
  OIF OEF TRANSITION PATIENT ADVOCATE to TCM TRANSITION PATIENT ADVOCATE
New positions
  ADMINISTRATIVE ASSOCIATE
  ANTICOAG CLINICAL PHARMACIST
  ADVANCE PRACTICE ASSOCIATE PROVIDER
  ASSOCIATE PROVIDER
  CLINICAL ASSOCIATE
  FELLOW
  NURSE (LVN)
  NURSE PRACTITIONER ASSOCIATE PROVIDER
  PEER SUPPORT APPRENTICE
  PEER SUPPORT SPECIALIST
  PHYSICIAN ASSISTANT ASSOCIATE PROVIDER
  PRIMARY CARE PROVIDER
  SURROGATE CARE MANAGER
  SURROGATE PRIMARY CARE PROVIDER
  SURROGATE CLINICAL ASSOCIATE
  ADVANCE PRACTICE NURSE
  ADVANCE PRACTICE NURSE (MHTC)
  LEAD COORDINATOR
  PEER SUPPORT SPECIALIST (MHTC)

POSITION ASSIGNMENT HISTORY (#404.52) file
A new field was added:
  TEAMLET POSITION (#.12) field - indicates whether or not a position is a
  teamlet member.
The descriptions for the following field descriptions were modified to

reflect that PCMM Web will maintain FTEE history data.
   FTEE HISTORY multiple (#1)
      FTEE HISTORY (#.01) field
      VALUE (#.02) field
      USER (#.03) field
The trigger (FTEXR) on the FTEE EQUIVALENT (#.09) field will be deleted by
the post-install routine. (This trigger performed updates to FTEE
HISTORY, now maintained by PCMM Web.)

PATIENT TEAM ASSIGNMENT (#404.42) file - New code values were added to two
fields.
   ASSIGNMENT TYPE (#.08) field
      '98' for PENDING PRIMARY CARE
   STATUS (#.15) field
      'DU' for DOD UNASSIGN
      'IU' for INACTIVE UNASSIGN
      'DD' for REASSIGN-DOD REMOVED
      'PR' for PAT RELOCATION
      'RP' for REQ BY PAT
      'NN' for NOT NEEDED
      'PC' for PROV CHANGE
      'PI' for MVI MOVE/MERGE
      'FT' for INTRA FAC TRANS
      'MU' for MISSING/UNK
      'MD' for M-PACT DENIAL/WDRAW
      'DC' for DISCHARGE FROM CARE
      'ER' for ERROR

PATIENT TEAM POSITION ASSIGNMENT (#404.43) file - New code values were
added to one field.
   STATUS (#.12) field
      'DU' for DOD UNASSIGN
      'IU' for INACTIVE UNASSIGN
      'DD' for REASSIGN-DOD REMOVED
      'PR' for PAT RELOCATION
      'RP' for REQ BY PAT
      'NN' for NOT NEEDED
      'PC' for PROV CHANGE
      'PI' for MVI MOVE/MERGE
      'FT' for INTRA FAC TRANS
      'MU' for MISSING/UNK
      'MD' for M-PACT DENIAL/WDRAW
      'DC' for DISCHARGE FROM CARE
      'ER' for ERROR
A new cross reference ("C") was added to TEAM POSITION (#.02) field

OUTPATIENT PROFILE (#404.41) file - Two new fields were added:
   CPRS HEADER TEXT (#.06) field - This field is populated by PCMM Web with
      primary care information to be displayed in the CPRS PCMM Header.
   CPRS PC WINDOW CACHE (#.07) field - This field stores the last data set
      displayed in the CPRS Primary Care Details Window. This cached data
      will be displayed if there is no connection to PCMM Web.

OUTPATIENT ENCOUNTER (#409.68) file - A new Index, ACOD, was created to
sort records by the PATIENT (#.02) field and CHECK OUT PROCESS COMPLETION

(#.07) field.

PCMM PATIENT EVENTS (#404.54) file - This is a new file used to track
patient events of interest to PCMM Web.
   PATIENT (#.01) field
   EVENT DATE/TIME (#.02) field
   EVENT CODE (#.03) field
   EVENT DATA (#.04) field

TEAM PURPOSE (#403.47) File - Two records were added:
   PRIMARY CARE - NVCC
   PRIMARY CARE - HBPC

Routines

The routine SCMCTSK was modified to update several files when a patient
date of death is entered or removed in the PATIENT (#2) file.
   - User enters or removes a date of death for a patient in VistA
   - A cross reference on the PATIENT (#2) file DATE OF DEATH (#.351) field
     executes
       FC^DGFCPROT
   - This routine submits the DG FIELD MONITOR protocol to TaskMan
   - The DG FIELD MONITOR protocol executes the protocols in its Items list
   - The SCMC PCMM INACTIVATE ON DATE OF DEATH protocol executes
       DEATH^SCMCTSK
   - This entry point updates the following File
       PCMM PATIENT EVENTS (#404.54) file - record is created or updated

The routine SCMCTSK2 was modified to ensure the PCMM NIGHTLY TASK [SCMC
PCMM NIGHTLY TASK] menu option job never runs on VistA. (A QUIT statement
was added immediately after the entry point - NIGHT.)

Three new routines; SCMCWS1, SCMCWS1A, SCMCWSUT; were developed to
implement a new Application Program Interface (API) that calls a PCMM Web
web service to retrieve PACT and other team information that is displayed
in the CPRS PC Details Window.
This API uses the HealtheVet Web Service Client (HWSC) to implement the
web service. The default set up is performed by the post-install routine.
This API is called by the CPRS RPC: ORWPT1 PCDETAIL. A new ICR, 6027 -
SCMC PCMM/R GET PRIMARY CARE DETAILS, was created and activated to
support this functionality.
These routines are also used by the new RPC, SCMC PCDETAIL. It is used to
batch load CPRS PC Window Cache during PCMMR deployment.

****
NOTE: Sites will encounter an XINDEX Error after the installation of this
patch. SCMCWS1 uses HWSC. It calls a Cache Class to parse the eXtensible
Markup Language (XML) document returned by the web service call.
A SAC Exemption (134) was approved on 02/04/2015.
****

A new routine, SCMCDDR, was developed to implement the RPC, SCMC LISTER.
It returns VistA data to PCMM Web using the VA FileMan DBS API: Lister
(LIST^DIC).

A new routine, SCMCDDR0, was developed to implement the RPC, SCMC FINDER. It returns VistA data to PCMM Web using the VA FileMan DBS API: Find (FIND^DIC).

A new routine, SCMCDDR2, was developed to implement the RPC, SCMC GETS ENTRY DATA. It returns VistA data to PCMM Web using the VA FileMan DBS API: Data Retriever (GETS^DIQ).

A new routine, SCMCDDR3, was developed to implement the RPC, SCMC FILER. It updates VistA data from PCMM Web using a VA FileMan DBS APIs: Filer (FILE^DIE) and Updater (UPDATE^DIE).

A new routine, SCMCENCT, was developed to implement the RPC, SCMC GET PATIENT ENCOUNTERS. It returns patient encounter data to PCMM Web. The data is used to determine if and when a patient had a completed encounter with a teamlet member.

A new routine, SCMCNPER, was developed to implement the RPC, SCMC GET NEW PERSON. It returns provider information to PCMM Web.

A new routine, SCMCPAT, was developed to implement two RPCs.
 SCMC PATIENT DIEDON returns a patient's date of death to PCMM Web.
 SCMC PATIENT INFO returns patient demographic information to PCMM Web.

A new routine, SCMCFTEE, was developed to implement five RPCs; SCMC FTEE CREATE, SCMC FTEE READ, SCMC FTEE READALL, SCMC FTEE UPDATE, SCMC FTEE DELETE. They allow PCMM Web to maintain FTEE HISTORY multiple (#1) in the POSITION ASSIGNMENT HISTORY (#404.52) file.

The routine SCMCMHTC was modified to fix a date comparison issue.

The routine SCAPMC23 was modified to correct an endless loop when reading unexpected data.

The routine SCMCDD1 was modified to create or update OUTPATIENT PROFILE (#404.41) file records for all assignment types. The routine was also modified to add "fail-safes" to quit processing if PATIENT TEAM ASSIGNMENT (#404.42) file or PATIENT TEAM POSITION ASSIGNMENT (#404.43) file records are not found when sending mail messages.

Two routines, SCMCTSK5 and SCMCTSK6, were modified to change auto-inactivation related time periods and other text in report and mail boiler plate text. All auto-inactivation processing will be performed by PCMM Web.

The routine SDCOU was modified to create ACOD index records for Credit Stop Code OUTPATIENT ENCOUNTER (#409.68) file records. The original code did not properly handle new style indexes. The Set and Kill logic was modified to do so.

The pre-install routine, SD53I603, was developed to perform the following actions:
 - Delete the global for the STANDARD POSITION (#403.46) file and create the initial file header.

The post-install routine, SD53P603, was developed to perform the
following actions:
 - Add or update HWSC server and web service file entries
 - Add the application proxy user
 - Convert values in the PATIENT TEAM POSITION ASSIGNMENT (#404.43) file
   STATUS (#.12) field from NA to IU
 - Build the new ACOD index for the OUTPATIENT ENCOUNTER (#409.68) file
 - Build the new C cross reference for PATIENT TEAM POSITION ASSIGNMENT
   (#404.43) file
 - Un-schedule the legacy PCMM NIGHTLY TASK [SCMC PCMM NIGHTLY TASK]
   menu option from TaskMan
 - Place PCMM legacy menu options out-of-order
 - Change users' secondary menu option from SCMC PCMM GUI WORKSTATION to
   SCMC PCMMR WEB USER MENU
 - Create missing ACOD index records in the OUTPATIENT ENCOUNTER (#409.68)
   file
 - Delete the trigger cross reference (FTEXR) on the POSITION ASSIGNMENT
   HISTORY (404.52) file FTEE EQUIVALENT (#.09) field
 - Create two records in the TEAM PURPOSE (#403.47) file
    - PRIMARY CARE - NVCC
    - PRIMARY CARE - HBPC

A new routine, SCMCOPT, was developed to place a number of PCMM legacy
menu options and a protocol out-of-order. The items to be placed
out-of-order are listed below in the Options Associated and Protocols
Associated sections. This routine also contains an entry point to change
the value in the SECONDARY MENU OPTIONS (#.01) field in the SECONDARY MENU
OPTIONS (#203) multiple in the NEW PERSON (#200) file for users that
have the option SCMC PCMM GUI WORKSTATION to SCMC PCMMR WEB USER MENU.
Both entry points are called by the post-installation routine, SD53P603.

A new routine, SCMCFPOS, was developed to fix the TEAM POSITION (#404.57)
file at sites that have deviated from the gold STANDARD POSITION (#403.46)
file that is released with this patch.

Patch Components
================

Files & Fields Associated:

File Name (#)	Field Name (#)	New/Modified/Deleted
PATIENT TEAM ASSIGNMENT file (#404.42)		
STATUS field	(#.15)	Modified - new codes
ASSIGNMENT TYPE field	(#.08)	Modified - new code
PATIENT TEAM POSITION ASSIGNMENT file (#404.43)		
TEAM POSITION	(#.02)	New C cross reference
STATUS	(#.12)	Modified - new codes
POSITION ASSIGNMENT HISTORY file (#404.52)		
TEAMLET POSITION field	(#.12)	New
FTEE HISTORY multiple	(#1)	Modified

```
    FTEE HISTORY field          (#.01)                     Modified
    VALUE field                 (#.02)                     Modified
    USER field                  (#.03)                     Modified


OUTPATIENT PROFILE file  (#404.41)
 CPRS HEADER TEXT field      (#.06)                        New
 CPRS PC WINDOW CACHE field (#.07)                         New


OUTPATIENT ENCOUNTERS file (#409.68)
 PATIENT field               (#.02)           Added ACOD index for .02 and .07


PCMM PATIENT EVENTS        (#404.54)                       New
  PATIENT field             (#.01)                         New
  EVENT DATE/TIME field     (#.02)                         New
  EVENT CODE field          (#.03)                         New
  EVENT DATA field          (#.04)                         New


STANDARD POSITION file (#403.46) no DD change, updated and added positions



Forms Associated:
Form Name               File #              New/Modified/Deleted
---------               ------              --------------------
N/A



Mail Groups Associated:
Mail Group Name             New/Modified/Deleted
---------------             --------------------
N/A



Options Associated:
Option Name                 Type          New/Modified/Deleted
-----------                 ----          --------------------
SCMC PCMMR APP PROXY MENU   broker        new
SCMC PCMMR WEB USER MENU    broker        new
SC PCMM MARK OPT OUT OF ORDER routine     new
SCMC PCMM NIGHTLY TASK      routine       out-of-order
SCMC PATIENT ASSIGN/UNASSIGN routine      out-of-order
SCMC CLEAN GHOST ENTRIES    routine       out-of-order
SCMC CLEAN INSTITUTION      routine       out-of-order
SCMC CONVERSION TOOLS MENU  menu          out-of-order
SCMC EXTEND A PATIENT       routine       out-of-order
SCMC FLAGGED                routine       out-of-order
SCMC MU MASS TEAM UNASSIGNMENT routine    out-of-order
SCMC PC ATTENDING CONVERSION routine      out-of-order
SCMC PCMM BASELINE SEEDING  routine       out-of-order
SCMC PCMM EDIT PRACTIT #404.52 routine    out-of-order
SCMC PRECEPTOR CONVERSION   routine       out-of-order
SCMC PRECEPTOR MIGRATION RPT routine      out-of-order
SCMC RETRANSMIT             routine       out-of-order
SCMC PCMM GUI WORKSTATION   broker        out-of-order
SCMC PC ATTENDING ASGN RPT  routine       out-of-order
```

```
Protocols Associated:
Protocol Name                  New/Modified/Deleted
-------------                  --------------------
SC PC PATIENT ASSIGN/UNASSIGN  disabled


Security Keys Associated:
Security Key Name
-----------------
N/A


Remote Procedures Associated:
RPC Name                       New/Modified/Deleted
-------------                  --------------------
SCMC LISTER                    New
SCMC FINDER                    New
SCMC GETS ENTRY DATA           New
SCMC FILER                     New
SC DELETE ENTRY                Modified-set APP PROXY ALLOWED to Y
SCMC GET PATIENT ENCOUNTERS    New
SCMC GET NEW PERSON            New
SC PAT ASGN MAILMAN            Modified-set APP PROXY ALLOWED to Y
SC PATIENT LOOKUP              Modified-set APP PROXY ALLOWED to Y
SCMC PATIENT DIEDON            New
SCMC PATIENT INFO              New
SCMC FTEE CREATE               New
SCMC FTEE READ                 New
SCMC FTEE READALL              New
SCMC FTEE UPDATE               New
SCMC FTEE DELETE               New
SCMC PCDETAIL                  New


Templates Associated:
Template Name      Type    File Name (#)       New/Modified/Deleted
-------------      ----    -----------------   --------------------
SCMC INACTIVATED   SORT    #404.43             modified


Additional Information:
-----------------------
N/A


New Service Requests (NSRs):
------------------------------
20070415 - Rehost/Reengineer PCMM


Patient Safety Issues (PSIs):
------------------------------
N/A
```

```
Remedy Ticket(s) & Overviews:
------------------------------
N/A


Test Sites:
-----------
Memphis VAMC - Memphis, TN
Iron Mountain VAMC - Iron Mountain MI
VA West Los Angeles HCS  - Los Angeles, CA
Portland VAMC - Portland, OR


Documentation Retrieval Instructions:
=====================================
Updated documentation describing the new functionality introduced by this
patch is available.

The preferred method is to FTP the files from
ftp://download.vista.med.va.gov/.
This transmits the files from the first available FTP server. Sites may
also elect to retrieve software directly from a specific server as
follows:

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>

The documentation will be in the form of Adobe Acrobat files.

Documentation can also be found on the VA Software Documentation Library
at: http://www.va.gov/vdl/

File Description                   File Name                 FTP Mode
-------------------------------------------------------------------------
Installation Guide                SD_53_603_IG.PDF          binary
Release Notes                     SD_53_603_RN.PDF          binary
User Guide                        SD_53_603_UM.PDF          binary
Technical Manual                  SD_53_603_TM.PDF          binary

Software Retrieval Instructions:
================================
The VistA software for this patch is released as a KIDS host file. It may
be downloaded from a secured ftp site as directed by the PCMM Web
Implementation Team.
The software distribution includes:

File Name             Contents         Retrieval Format
---------             --------         ----------------
SD_53_603.KID         KIDS Build       ascii


Patch Installation:
===================
```

This patch is a part of a phased, coordinated process for deploying PCMM Web.

```
********************************************************************
DO NOT INSTALL THIS PATCH ON A PRODUCTION SYSTEM UNTIL NOTIFIED BY
THE PCMM WEB IMPLEMENTATION MANAGER.
********************************************************************
```

Please refer to the PCMM Web-VistA Installation Guide for complete details.

Routine Information:
====================

The second line of each of these routines now looks like:
;;5.3;Scheduling;**[Patch List]**;AUG 13, 1993;Build 79

The checksums below are new checksums, and
 can be checked with CHECK1^XTSUMBLD.

Routine Name: SCAPMC23
    Before: B18108399   After: B18453123 **41,148,603**
Routine Name: SCMCDD1
    Before: B22709019   After: B25172674 **41,89,107,603**
Routine Name: SCMCDDR
    Before: n/a   After: B34341424 **603**
Routine Name: SCMCDDR0
    Before: n/a   After: B16319343 **603**
Routine Name: SCMCDDR2
    Before: n/a   After: B24257447 **603**
Routine Name: SCMCDDR3
    Before: n/a   After: B6820328 **603**
Routine Name: SCMCENCT
    Before: n/a   After: B28013021 **603**
Routine Name: SCMCFPOS
    Before: n/a   After: B95974585 **603**
Routine Name: SCMCFTEE
    Before: n/a   After: B17041744 **603**
Routine Name: SCMCMHTC
    Before: B9636096   After: B10680608 **575,603**
Routine Name: SCMCNPER
    Before: n/a   After: B40344757 **603**
Routine Name: SCMCOPT
    Before: n/a   After: B44626560 **603**
Routine Name: SCMCPAT
    Before: n/a   After: B7157117 **603**
Routine Name: SCMCTSK
    Before: B36651125   After: B38253964 **264,278,272,297,581,603**
Routine Name: SCMCTSK2
    Before:B103317459   After:B105827282 **297,498,527,499,532,504,603**
Routine Name: SCMCTSK5
    Before: B58969240   After: B59325306 **297,532,539,603**
Routine Name: SCMCTSK6
```

```
      Before: B61520556   After: B61603528  **297,532,581,603**
Routine Name: SCMCWS1
      Before:       n/a  After:B162034987  **603**
Routine Name: SCMCWS1A
      Before:       n/a  After: B97769299  **603**
Routine Name: SCMCWSUT
      Before:       n/a  After:  B5582990  **603**
Routine Name: SD53I603
      Before:       n/a  After:   B142505  **603**
Routine Name: SD53P603
      Before:       n/a  After:B249302623  **603**
Routine Name: SDCOU
      Before: B4920937   After:  B4357231  **603**


Routine list of preceding patches: 107, 148, 504, 539, 575, 581



===============================================================================
User Information:
  Entered By  :   SHUMWAY,GARY        Date Entered  :   OCT 22,2012
  Completed By:   YARLAGADDA,MADHAVI  Date Completed:   NOV  5,2015
  Released By :                       Date Released :
===============================================================================
```

11. Appendix E – Patch Description OR*3.0*387

```
VistA Patch Display                                              Page: 1
===============================================================================
Run Date: NOV 05, 2015                  Designation: OR*3*387
Package : ORDER ENTRY/RESULTS REPORTING  Priority   : MANDATORY
Version : 3                               Status     : COMPLETE/NOT RELEASED
===============================================================================

Associated patches: (v)OR*3*306   <<= must be installed BEFORE `OR*3*387'
                    (c)SD*5.3*603  <<= must be installed BEFORE `OR*3*387'


Subject:  PCMM WEB TEAM DISPLAY ENHANCEMENTS TO CPRS

Category:  ROUTINE
           ENHANCEMENT

Description:
===========

This patch addresses changes to the code behind two CPRS RPCs required to
support the release and use of Patient-Centered Management Module (PCMM)
Web. It is released in conjunction with SD*5.3*603.

This patch is a part of a phased, coordinated process for deploying PCMM
Web. The VistA software for this patch and the companion SD*5.3*603
patch is released as two KIDS host files. They may be downloaded from a
secured ftp site as directed by the PCMM Web Implementation Team.
```

```
*************************************************************************
DO NOT INSTALL THIS PATCH ON A PRODUCTION SYSTEM UNTIL NOTIFIED BY
THE PCMM WEB IMPLEMENTATION MANAGER.
CPRS WILL NOT FUNCTION PROPERLY IF THIS PATCH IS INSTALLED PREMATURELY.
*************************************************************************
```

If the ORWPT1 PRCARE RPC is called by CPRS, the content of the first
line of the PCMM Header Button is determined and formatted by PCMM Web,
and stored in the Outpatient Profile File (404.41). The RPC code has
been modified to retrieve the data from there. If the RPC is not
called by CPRS, the data format remains as it was. The Mental Health line
in the header was modified to include the MH Team name.
Associated routine: ORWPT1
Associated ICRs
    6042 - SCMC PCMM/R GET PRIMARY CARE SUMMARY
    5972 - ORWPT1 PRCARE

If the ORWPT1 PCDETAIL RPC is called by CPRS, the contents of the Primary
Care Detail Window is retrieved from PCMM Web by a web service, formatted,
returned to CPRS, and displayed in the window. If the RPC is not called
by CPRS, the data format remains as it was.
Associated routine: ORWPT1
Associated ICRs
    6027 - SCMC PCMM/R GET PRIMARY CARE DETAILS
    5971 - ORWPT1 PCDETAIL

Patch Components:

Files & Fields Associated:

File Name (Number)	Field Name (Number)	New/Modified/Deleted
N/A		

Forms Associated:

Form Name	File #	New/Modified/Deleted
N/A		

Mail Groups Associated:

Mail Group Name	New/Modified/Deleted
N/A	

Options Associated:

Option Name	Type	New/Modified/Deleted
N/A		

Protocols Associated:

```
Protocol Name        New/Modified/Deleted
-------------        --------------------
N/A

Security Keys Associated:

Security Key Name
-----------------
N/A

Templates Associated:

Template Name      Type      File Name (Number)  New/Modified/Deleted
-------------      ----      ------------------  --------------------
N/A

Remote Procedure Calls Associated:

RPC Name                     New/Modified/Deleted
--------                     --------------------
ORWPT1 PRCARE                Internal documentation updated.
ORWPT1 PCDETAIL              Internal documentation updated.

Additional Information:

New Service Requests (NSRs):
----------------------------
N/A

Patient Safety Issues (PSIs):
----------------------------
N/A

Remedy Ticket(s) & Overview:
----------------------------
None.


Test Sites:
----------
Memphis VAMC - Memphis, TN
Iron Mountain VAMC - Iron Mountain MI
VA West Los Angeles HCS - Los Angeles, CA
Portland VAMC - Portland, OR


Documentation Retrieval Instructions:
-------------------------------------
Updated documentation describing the new functionality introduced by this
patch is available.

The preferred method is to FTP the files from
ftp://download.vista.med.va.gov/.
This transmits the files from the first available FTP server. Sites may
```

also elect to retrieve software directly from a specific server as
follows:

```
 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>
```

Documentation can also be found on the VA Software Documentation Library
at: http://www.va.gov/vdl/

```
File Description                    File Name                FTP Mode
-----------------------------------------------------------------------------
Installation Guide                 SD_53_603_IG.PDF          binary
Release Notes                      OR_30_387_RN.PDF          binary
```
(This patch is released with SD*5.3*603. Installation notes for both
patches are in the same document.)

NOTE: Updates to the Primary Care Header and Window Changes will be
documented in the CPRS User guide with the release of CPRS 30.b
(OR*3.0*350).
References in the CPRS Help files to PCMM will also be updated in that
version.

Software Retrieval Instructions:
================================
The VistA software for this patch is released as a KIDS host file. It may
be downloaded from a secured ftp site as directed by the PCMM Web
Implementation Team.
The software distribution includes:

```
File Name           Contents          Retrieval Format
---------           --------          ----------------
OR_30_387.KID       KIDS Build        ascii
```


Patch Installation:
===================

This patch is a part of a phased, coordinated process for deploying PCMM
Web.

```
**********************************************************************
DO NOT INSTALL THIS PATCH ON A PRODUCTION SYSTEM UNTIL NOTIFIED BY
THE PCMM WEB IMPLEMENTATION MANAGER.
**********************************************************************
```

Please refer to the PCMM Web-VistA Installation Guide for complete
details.

Routine Information:
====================

The second line of each of these routines now looks like:

```
;;3.0;ORDER ENTRY/RESULTS REPORTING;**[Patch List]**;Dec 17, 1997;Build 21

The checksums below are new checksums, and
 can be checked with CHECK1^XTSUMBLD.

Routine Name: ORWPT1
    Before: B25961923   After: B33003577  **10,109,280,340,306,387**

Routine list of preceding patches: 306



===============================================================================
User Information:
  Entered By  :   THOMPSON,ANDREW R   Date Entered  :   DEC 16,2013
  Completed By:   YARLAGADDA,MADHAVI  Date Completed:   NOV  5,2015
  Released By :                       Date Released :
===============================================================================
```

12. Appendix F – Sample Install Record SD*5.3*620

```
NAME: SD*5.3*620
  PACKAGE FILE LINK: SCHEDULING          DATE LOADED: JUL 21, 2014@16:35:47
  STARTING PACKAGE: SD*5.3*620           INSTALL ORDER: 1
  REQUIRED TO CONTINUE: NO               SETNAME: 0SD*5.3*620
  STATUS: Install Completed              DISABLE OPTION DELAY: 0
  INSTALLED BY: THOMPSON,ANDREW
  INSTALL START TIME: JUL 21, 2014@16:40:22
  ROUTINE INSTALL TIME: JUL 21, 2014@16:40:22
  INSTALL COMPLETE TIME: JUL 21, 2014@16:40:23
  DISTRIBUTION DATE: JUL 21, 2014        FILE COMMENT: SD*5.3*620 TEST v9
  TEST#: 9
PRE-INIT CHECK POINTS: XPD PREINSTALL COMPLETED
  COMPLETED TIME: JUL 21, 2014@16:40:22
POST-INIT CHECK POINTS: XPD POSTINSTALL COMPLETED
  COMPLETED TIME: JUL 21, 2014@16:40:22
BUILD COMPONENT: OPTION                 DATA TIME: JUL 21, 2014@16:40:22
  INSTALL ORDER: 18
BUILD COMPONENT: SECURITY KEY           DATA TIME: JUL 21, 2014@16:40:22
  INSTALL ORDER: 3
 MESSAGES:

  Install Started for SD*5.3*620 :
            Jul 21, 2014@16:40:22

 Build Distribution Date: Jul 21, 2014

  Installing Routines:
            Jul 21, 2014@16:40:22

  Installing PACKAGE COMPONENTS:

  Installing SECURITY KEY

  Installing OPTION
```

```
                        Jul 21, 2014@16:40:22

   Updating Routine file...

   Updating KIDS files...

   SD*5.3*620 Installed.
                        Jul 21, 2014@16:40:23

   Not a production UCI

   NO Install Message sent
NAME: XPO1                              ANSWER: 0
   PROMPT: Want KIDS to Rebuild Menu Trees Upon Completion of Install
   EXTERNAL ANSWER: NO
NAME: XPI1                              ANSWER: 0
   PROMPT: Want KIDS to INHIBIT LOGONs during the install
   EXTERNAL ANSWER: NO
NAME: XPZ1                              ANSWER: 0
   PROMPT: Want to DISABLE Scheduled Options, Menu Options, and Protocols
   EXTERNAL ANSWER: NO
ROUTINES: SCRPPAHS
ROUTINES: SCRPPRAH
ROUTINES: SCRPPTA
ROUTINES: SCRPPTPA
ROUTINES: SCRPTEAM
ROUTINES: SCRPTHST
ROUTINES: SCRPTPHS
ROUTINES: SCRPTPOS
```

13. Appendix G – Sample Install Record SD*5.3*603

```
NAME: SD*5.3*603                        PACKAGE FILE LINK: SCHEDULING
   DATE LOADED: MAR 04, 2015@19:20:40   STARTING PACKAGE: SD*5.3*603
   INSTALL ORDER: 1                     REQUIRED TO CONTINUE: NO
   SETNAME: 0SD*5.3*603                 STATUS: Install Completed
   DISABLE OPTION DELAY: 0              INSTALLED BY: THOMPSON,ANDREW
   INSTALL START TIME: MAR 04, 2015@19:21:57
   ROUTINE INSTALL TIME: MAR 04, 2015@19:21:57
   INSTALL COMPLETE TIME: MAR 04, 2015@19:23:30
   DISTRIBUTION DATE: MAR 04, 2015
   FILE COMMENT: Patch to Support PCMM Web  ;Created on Mar 04, 2015@18:57:01
FILE: STANDARD POSITION
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
   DATA TIME: MAR 04, 2015@19:21:58
FILE: OUTPATIENT PROFILE
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
FILE: PATIENT TEAM ASSIGNMENT
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
FILE: PATIENT TEAM POSITION ASSIGNMENT
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
FILE: POSITION ASSIGNMENT HISTORY
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
FILE: PCMM PATIENT EVENTS
```

```
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
FILE: OUTPATIENT ENCOUNTER
   DATA DICTIONARY TIME: MAR 04, 2015@19:21:57
PRE-INIT CHECK POINTS: XPD PREINSTALL COMPLETED
   COMPLETED TIME: MAR 04, 2015@19:21:57
PRE-INIT CHECK POINTS: XPD PREINSTALL STARTED
   COMPLETED TIME: MAR 04, 2015@19:21:57
   CALLBACK: EN^SD53I603
POST-INIT CHECK POINTS: XPD POSTINSTALL COMPLETED
   COMPLETED TIME: MAR 04, 2015@19:23:30
POST-INIT CHECK POINTS: XPD POSTINSTALL STARTED
   COMPLETED TIME: MAR 04, 2015@19:23:30
   CALLBACK: EN^SD53P603
BUILD COMPONENT: SORT TEMPLATE          DATA TIME: MAR 04, 2015@19:21:58
   INSTALL ORDER: 6
BUILD COMPONENT: OPTION                 DATA TIME: MAR 04, 2015@19:21:58
   INSTALL ORDER: 18
BUILD COMPONENT: REMOTE PROCEDURE       DATA TIME: MAR 04, 2015@19:21:58
   INSTALL ORDER: 16
 MESSAGES:

  Install Started for SD*5.3*603 :
               Mar 04, 2015@19:21:57

 Build Distribution Date: Mar 04, 2015

  Installing Routines:
               Mar 04, 2015@19:21:57

  Running Pre-Install Routine: EN^SD53I603

  Installing Data Dictionaries:
               Mar 04, 2015@19:21:57

  Installing Data:
               Mar 04, 2015@19:21:58

  Installing PACKAGE COMPONENTS:

  Installing SORT TEMPLATE

  Installing REMOTE PROCEDURE

  Installing OPTION
               Mar 04, 2015@19:21:58

  Running Post-Install Routine: EN^SD53P603
  o  WEB SERVICE 'PCMM-R GET PC INFO REST' addition/update succeeded.

  o  WEB SERVER 'PCMMR' addition/update succeeded.

  o  WEB SERVICE 'PCMM-R GET PC INFO REST' already registered to WEB SERVER 'PCMMR'

  o  WEB SERVER 'PCMMR TEST' addition/update succeeded.
```

     o WEB SERVICE 'PCMM-R GET PC INFO REST' already registered to WEB SERVER 'PCMMR TEST'

      o WEB SERVER LOOKUP KEY 'PCMMR SERVER' addition/update succeeded.

      o WEB SERVER LOOKUP KEY 'PCMMR SERVER' pointed to WEB SERVER 'PCMMR'

      o WEB SERVER LOOKUP KEY 'PCMMR TEST SERVER' addition/update succeeded.

      o WEB SERVER LOOKUP KEY 'PCMMR TEST SERVER' pointed to WEB SERVER 'PCMMR TEST'

      o SCMC,APPLICATION PROXY user already exists.

      o Convert Status (.12) in Patient Team Position Assignment (404.43) from NA to IU has completed.

      o SCMC PCMM NIGHTLY TASK deleted from the Scheduled Options file.

      o Legacy PCMM menu options were marked Out-of-Order.

      o Legacy PCMM - SC PC PATIENT ASSIGN/UNASSIGN - protocol was disabled.

      o Legacy PCMM Menu Options have been placed Out of Order

      o New Person records with Secondary Menu Option SCMC PCMM GUI WORKSTATION changed to SCMC PCMMR WEB USER MENU

 Delete the FTEXR Trigger in 404.52/.09

 The FTEXR trigger does not exist - previously deleted.
    o Patient Team Position Assignment C cross reference already exists.

     o Submitting Build Outpatient Encounters ACOD Index to Taskman.
     o A Mailman message will be sent when it has completed.

 Building Outpatient Encounters 'ACOD' index for child encounters.
 This job will be tasked to run in the background.
 A MailMan message will be sent to the installer upon completion.

  Updating Routine file...

  Updating KIDS files...

  SD*5.3*603 Installed.
            Mar 04, 2015@19:23:30

  Not a production UCI

  NO Install Message sent
NAME: XPO1   ANSWER: 0
  PROMPT: Want KIDS to Rebuild Menu Trees Upon Completion of Install
  EXTERNAL ANSWER: NO
NAME: XPI1   ANSWER: 0

```
   PROMPT: Want KIDS to INHIBIT LOGONs during the install
   EXTERNAL ANSWER: NO
NAME: XPZ1                                  ANSWER: 0
   PROMPT: Want to DISABLE Scheduled Options, Menu Options, and Protocols
   EXTERNAL ANSWER: NO
ROUTINES: SCAPMC23
ROUTINES: SCMCDD1
ROUTINES: SCMCDDR
ROUTINES: SCMCDDR0
ROUTINES: SCMCDDR2
ROUTINES: SCMCDDR3
ROUTINES: SCMCENCT
ROUTINES: SCMCFPOS
ROUTINES: SCMCFTEE
ROUTINES: SCMCMHTC
ROUTINES: SCMCNPER
ROUTINES: SCMCOPT
ROUTINES: SCMCPAT
ROUTINES: SCMCTSK
ROUTINES: SCMCTSK2
ROUTINES: SCMCTSK5
ROUTINES: SCMCTSK6
ROUTINES: SCMCWS1
ROUTINES: SCMCWS1A
ROUTINES: SCMCWSUT
ROUTINES: SD53I603
ROUTINES: SD53P603
ROUTINES: SDCOU
```

14. Appendix H – Sample Install Record OR*3.0*387

```
NAME: OR*3.0*387
   PACKAGE FILE LINK: ORDER ENTRY/RESULTS REPORTING
   DATE LOADED: SEP 05, 2014@15:03:32    STARTING PACKAGE: OR*3.0*387
   INSTALL ORDER: 1                       REQUIRED TO CONTINUE: NO
   SETNAME: 0OR*3.0*387                   STATUS: Install Completed
   DISABLE OPTION DELAY: 0                INSTALLED BY: THOMPSON,ANDREW
   INSTALL START TIME: SEP 05, 2014@15:05:54
   ROUTINE INSTALL TIME: SEP 05, 2014@15:05:54
   INSTALL COMPLETE TIME: SEP 05, 2014@15:05:54
   DISTRIBUTION DATE: SEP 04, 2014       FILE COMMENT: OR*3*387 TEST v16
   TEST#: 16
PRE-INIT CHECK POINTS: XPD PREINSTALL COMPLETED
   COMPLETED TIME: SEP 05, 2014@15:05:54
POST-INIT CHECK POINTS: XPD POSTINSTALL COMPLETED
   COMPLETED TIME: SEP 05, 2014@15:05:54
BUILD COMPONENT: REMOTE PROCEDURE        DATA TIME: SEP 05, 2014@15:05:54
   INSTALL ORDER: 16
 MESSAGES:

   Install Started for OR*3.0*387 :
              Sep 05, 2014@15:05:54

 Build Distribution Date: Sep 04, 2014
```

```
  Installing Routines:
             Sep 05, 2014@15:05:54

  Installing PACKAGE COMPONENTS:

  Installing REMOTE PROCEDURE
             Sep 05, 2014@15:05:54

  Updating Routine file...

  Updating KIDS files...

  OR*3.0*387 Installed.
             Sep 05, 2014@15:05:54

  Not a production UCI

  NO Install Message sent
NAME: XPI1                           ANSWER: 0
  PROMPT: Want KIDS to INHIBIT LOGONs during the install
  EXTERNAL ANSWER: NO
NAME: XPZ1                           ANSWER: 0
  PROMPT: Want to DISABLE Scheduled Options, Menu Options, and Protocols
  EXTERNAL ANSWER: NO
ROUTINES: ORWPT1
```

15. Appendix I – Check HealtheVet Web Service Client (HWSC) Configuration

> **NOTE: If needed, Appendix H includes additional information on the Health*e*Vet Web Services.**

The post-install routine for patch SD*5.3*603 creates entries in the HWSC configuration files to support a web service call to PCMM Web. Two server definitions are created: one for production PCMM Web, and one for a development test system. In some circumstances, it may be necessary to change the server name and/or port number for the production connection. Follow the steps below to change the server name or port.


```
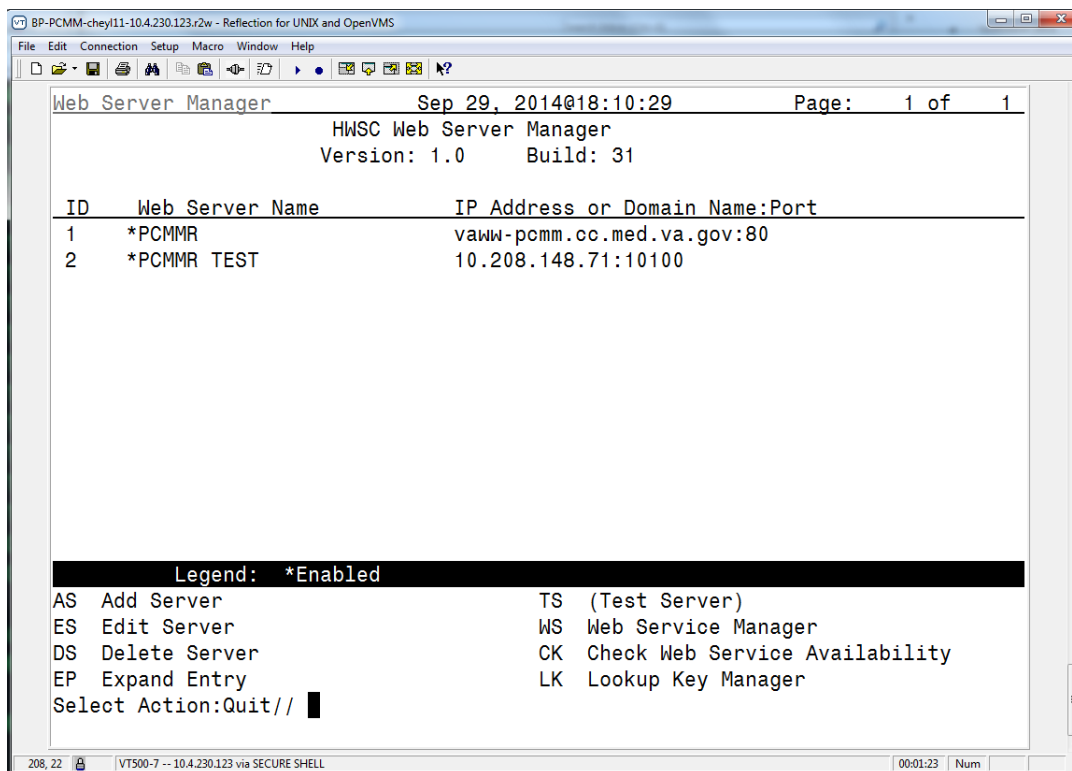VISTA>D ^XUP

Setting up programmer environment
This is a TEST account.

Terminal Type set to: C-VT320

Select OPTION NAME: XOBW WEB SERVER MANAGER        Web Server Manager
Web Server Manager
```



```
Select Action:Quit// ES   Edit Server
Select Web Server:  (1-2): 1
NAME: PCMMR//
SERVER: vaww-pcmm.cc.med.va.gov  Replace
PORT: 80//
DEFAULT HTTP TIMEOUT: 30//
Press Enter to not change any other values.
```