Update _2_0_67

Clinical Reminders

VA-POST 9/11 CASE MANAGEMENT SCREENING

Install Guide

January 2019

Product Development
Office of Information Technology
Department of Veterans Affairs

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Introduction

Description:

The Transition and Care Management (TCM) Program is pleased to announce the nationwide availability of the Post 9/11 Case Management Screening note template. VHA Directive 1010 requires that all Post 9/11 Veterans are screened for case management needs. In addition, we know that early identification, education and linkage to appropriate resources leads to better outcomes. Benefits of using the national note template include:

- National standardization of screening process
- Note template links to National Post 9/11 Case Management Screening Report
- Confidence in collection of valid & accurate data
- Trending data based on health factors within screening
- Capturing Post 9/11 Veteran population demand

This template has been designed by a multidisciplinary workgroup of field-based subject matter experts. The intent is to capture essential information in a manner to reduce burden to care providers.

It will be used within Transition and Care Management teams and Post Deployment clinics.

The national note title and template will be used in conjunction with a national report.

UPDATE_2_0_67 contains 1 Reminder Exchange entry:
> **UPDATE_2_0_67 VA-POST 9/11 CASE MANAGEMENT SCREENING**

The exchange file contains the following components:

TIU TEMPLATE FIELD
> VA*WP 65/6 INDENT2
> VA-EDIT BOX 30/8

HEALTH FACTORS
> VA-REMINDER UPDATES
> VA-UPDATE_2_0_67
> VA-POST 9/11 CASE MANAGEMENT SCREENING
> VA-POST 9/11 CMS CONTACT-OTHER
> VA-POST 9/11 CMS CONTACT-VTEL
> VA-POST 9/11 CMS CONTACT-PHONE
> VA-POST 9/11 CMS CONTACT-IN PERSON
> VA-POST 9/11 CMS TIME SPENT W/ PT
> VA-POST 9/11 CMS TIME W/ PT-11-20 MIN
> VA-POST 9/11 CMS TIME W/ PT-31-45 MIN
> VA-POST 9/11 CMS TIME W/ PT-5-10 MIN
> VA-POST 9/11 CMS TIME W/ PT-21-30 MIN
> VA-POST 9/11 CMS OUTCOME-NO NEEDS IDENT
> VA-POST 9/11 CMS OUTCOME-NEEDS NOT RSLVD
> VA-POST 9/11 CMS OUTCOME-NEEDS RESOLVED

VA-POST 9/11 CMS DIFFICULTIES
VA-POST 9/11 CMS DIFF-SOCIAL
VA-POST 9/11 CMS NO DIFF-SOCIAL
VA-POST 9/11 CMS NO DIFF-MANAGING CARE
VA-POST 9/11 CMS DIFF-MANAGING CARE
VA-POST 9/11 CMS NO DIFF-BENEFITS
VA-POST 9/11 CMS DIFF-BENEFITS
VA-POST 9/11 CMS DIFF-CARE BARRIERS
VA-POST 9/11 CMS NO DIFF-CARE BARRIERS
VA-POST 9/11 CMS CHRONIC CONDITIONS
VA-POST 9/11 CMS CHRONIC CONDITION-NO
VA-POST 9/11 CMS CC-OTHER
VA-POST 9/11 CMS CC-TBI
VA-POST 9/11 CMS CC-SUBSTANCE ABUSE
VA-POST 9/11 CMS CC-PTSD
VA-POST 9/11 CMS CC-NEUROPATHY
VA-POST 9/11 CMS CC-LIVER DISEASE
VA-POST 9/11 CMS CC-HEART DISEASE
VA-POST 9/11 CMS CC-DIABETES
VA-POST 9/11 CMS CC-DEPRESSION
VA-POST 9/11 CMS CC-DEGEN DISEASE
VA-POST 9/11 CMS CC-COPD
VA-POST 9/11 CMS CC-CHRONIC PAIN
VA-POST 9/11 CMS CC-CANCER
VA-POST 9/11 CMS CC-AMPUTATION
VA-POST 9/11 CMS CC-ANXIETY
VA-POST 9/11 CMS RECENT ADMISSIONS
VA-POST 9/11 CMS RECENT ER/ADMIT-YES
VA-POST 9/11 CMS RECENT ER/ADMIT-NO
VA-POST 9/11 CMS MED/MH CRISIS
VA-POST 9/11 CMS M/MH CRISIS-YES
VA-POST 9/11 CMS M/MH CRISIS-NO
VA-POST 9/11 CMS COMM-MAIL
VA-POST 9/11 CMS COMM-TEXT
VA-POST 9/11 CMS COMM-EMAIL
VA-POST 9/11 CMS COMM-PHONE
VA-POST 9/11 CMS-DECLINED
VA-POST 9/11 CMS OUTREACH PROTOCOL
VA-POST 9/11 CMS OUTREACH PROTOCOL-COMPL
VA-POST 9/11 CMS NO CONTACT-2ND ATTEMPT
VA-POST 9/11 CMS NO CONTACT-1ST ATTEMPT

REMINDER SPONSOR
Office of Quality & Performance

REMINDER TERM
        VA-REMINDER UPDATE_2_0_67

REMINDER DIALOG
        VA-POST 9/11 CASE MANAGEMENT SCREENING

HEALTH SUMMARY TYPE
        VA-BRIEF DEMOGRAPHICS

HEALTH SUMMARY OBJECTS
        VA-BRIEF DEMOGRAPHICS

TIU DOCUMENT DEFINITION
        VA-BRIEF DEMOGRAPHICS

Install Details

This update is being distributed as a web host file. The address for the host file is:
http://vista.med.va.gov/reminders/UPDATE_2_0_67.PRD

The file will be installed using Reminder Exchange, programmer access is not required.

Installation:
=============
This update can be loaded with users on the system. Installation will take less than 15 minutes.

Install Example
To Load the Web Host File. Navigate to Reminder exchange in Vista

```
+              + Next Screen   - Prev Screen   ?? More Actions                    >>>
CFE   Create Exchange File Entry        LHF   Load Host File
CHF   Create Host File                  LMM   Load MailMan Message
CMM   Create MailMan Message            LR    List Reminder Definitions
DFE   Delete Exchange File Entry        LWH   Load Web Host File
IFE   Install Exchange File Entry       RI    Reminder Definition Inquiry
IH    Installation History
Select Action: Next Screen// LWH    Load Web Host File
Input the URL for the .prd file: http://vista.med.va.gov/reminders/UPDATE_2_0_67.PRD
```

At the **Select Action:** prompt, enter **LWH** for Load Web Host File
At the **Input the url for the .prd file:** prompt, type the following web address:
http://vista.med.va.gov/reminders/UPDATE_2_0_67.PRD
You should see a message at the top of your screen that the file successfully loaded.

Search and locate an entry titled **UPDATE_2_0_67 VA-POST 9/11 CASE MANAGEMENT SCREENING** in reminder exchange.

```
+Item   Entry                        Source                  Date Packed
  128   UPDATE_2_0_67 VA-POST 9/11   GRIFFITH@SALT LAKE CI   12/27/2018@09:37
        CASE MANAGEMENT SCREENING  ◄━━━━
  129   UPDATE_2_0_68 VA-NUR SUR FIRE  PLOTT@SALT LAKE CI    12/12/2018@09:56
        RISK ASSESSMENT
  130   UPDATE_2_0_7                 MONTGOMERY@SALT LAKE CI 10/06/2015@11:24
  131   UPDATE_2_0_70 VA-VHA CHOICE/PC  GRIFFITH@SALT LAKE CI  12/14/2018@07:59
        CC APPROVAL FOR MEDICAL CARE
  132   UPDATE_2_0_71 VA-ORAL CARE   SMALLEY@SALT LAKE CI    12/13/2018@12:57
        TEMPLATE
  133   UPDATE_2_0_71 VA-ORAL CARE   SMALLEY@SALT LAKE CI    12/20/2018@09:50
+          + Next Screen   - Prev Screen   ?? More Actions             >>>
CFE   Create Exchange File Entry       LHF   Load Host File
CHF   Create Host File                 LMM   Load MailMan Message
CMM   Create MailMan Message           LR    List Reminder Definitions
DFE   Delete Exchange File Entry       LWH   Load Web Host File
IFE   Install Exchange File Entry      RI    Reminder Definition Inquiry
IH    Installation History
Select Action: Next Screen// IFE   Install Exchange File Entry
Enter a list or range of numbers (1-218): 128
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry titled **UPDATE_2_0_67 VA-POST 9/11 CASE MANAGEMENT SCREENING** *(in this example it is entry 128 it will vary by site)*

```
        Component                                  Category    Exists
Source:      GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 12/27/2018@09:37
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-POST 9/11 CASE MANAGEMENT SCREENING

REMINDER TERM
  VA-REMINDER UPDATE_2_0_67

Keywords:

Components:

+          Enter ?? for more actions                                 >>>
IA   Install all Components           IS   Install Selected Component
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** for Install all Components and hit enter.
Select Action: Next Screen// IA   Install all Components
You will see several prompts, for all new entries you will choose **I to Install**

You will be prompted to install the reminder dialog component:

```
Packed reminder dialog: VA-POST 9/11 CASE MANAGEMENT SCREENING

 Item  Seq. Dialog Findings                              Type     Exists
    1      VA-POST 9/11 CASE MANAGEMENT SCREENING          dialog

    2    5 VA-GP POST 9/11 CASE MANAGMENT SCREEN            group
             Finding: *NONE*
    3    5.5 VA-GP POST 9/11 CMS-UNABLE TO CONTACT          group
             Finding: *NONE*
    4    5.5.5 VA-HF POST 9/11 CMS UNABLE TO CONTACT-1ST   element
         ATTEMPT
             Finding: VA-POST 9/11 CMS NO CONTACT-1ST ATTEMPT (HEALTH    X
             FACTOR)
    5    PXRM COMMENT                                      prompt     X
    6    5.5.10 VA-HF POST 9/11 CMS UNABLE TO CONTACT-2ND  element
         ATTEMPT
             Finding: VA-POST 9/11 CMS NO CONTACT-2ND ATTEMPT (HEALTH    X
             FACTOR)
+          + Next Screen    - Prev Screen   ?? More Actions
DD   Dialog Details      DT   Dialog Text      IS   Install Selected
DF   Dialog Findings     DU   Dialog Usage     QU   Quit
DS   Dialog Summary      IA   Install All
Select Action: Next Screen// IA
```

At the **Select Action** prompt, type **IA** to install the dialog – **VA-POST 9/11 CASE MANAGEMENT SCREENING**

Select Action: Next Screen// IA   Install All

Install reminder dialog and all components with no further changes: Y// Yes

```
Packed reminder dialog: VA-POST 9/11 CASE MANAGEMENT SCREENING
VA-POST 9/11 CASE MANAGEMENT SCREENING (reminder dialog) installed from exchange
 Item  Seq. Dialog Findings                              Type     Exists
    1      VA-POST 9/11 CASE MANAGEMENT SCREENING          dialog     X

    2    5 VA-GP POST 9/11 CASE MANAGMENT SCREEN            group      X
             Finding: *NONE*
    3    5.5 VA-GP POST 9/11 CMS-UNABLE TO CONTACT          group      X
             Finding: *NONE*
    4    5.5.5 VA-HF POST 9/11 CMS UNABLE TO CONTACT-1ST   element     X
         ATTEMPT
             Finding: VA-POST 9/11 CMS NO CONTACT-1ST ATTEMPT (HEALTH    X
             FACTOR)
    5    PXRM COMMENT                                      prompt     X
    6    5.5.10 VA-HF POST 9/11 CMS UNABLE TO CONTACT-2ND  element     X
         ATTEMPT
             Finding: VA-POST 9/11 CMS NO CONTACT-2ND ATTEMPT (HEALTH    X
             FACTOR)
+          + Next Screen    - Prev Screen   ?? More Actions
DD   Dialog Details      DT   Dialog Text      IS   Install Selected
DF   Dialog Findings     DU   Dialog Usage     QU   Quit
DS   Dialog Summary      IA   Install All
Select Action: Next Screen// Q
```

When the dialog has completed installation, you will then be returned to this screen. At the **Select Action** prompt, type **Q.**

You will then be prompted to install the Health Summary Component, you will choose <mark>I to install</mark> each of these components.

```
         Component                                        Category      Exists
Source:       GRIFFITH,ELIZABETH A at SALT LAKE CITY
Date Packed: 12/27/2018@09:37
Package Version: 2.0P35

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-POST 9/11 CASE MANAGEMENT SCREENING

REMINDER TERM
  VA-REMINDER UPDATE_2_0_67

Keywords:

Components:

+            Enter ?? for more actions                               >>>
IA    Install all Components          IS    Install Selected Component
Select Action: Next Screen// Q
```

When the dialog has completed installation, you will then be returned to this screen. At the **Select Action** prompt, type **Q.**

Install complete.

Post Installation

1. If your site would need to generate an order or consult for further assessment when the Veteran has unresolved needs, you can insert your local consult or order into the dialog. You will use the reminder dialog manager menu, reminder dialogs, and then change your view to ELEMENT view. Search for and edit the element **VA-HF POST 9/11 CMS OUTCOMES-NEEDS UNRESOLVED/ACCEPTS CM**. Add your local consult order as an additional finding.

   Work with your local Transition and Care Management (TCM) Program to see if they would like to add an order to this element.

2. **Make the Dialog able to be attached to a Personal/Shared template or to a progress note title.**
   From the Reminders Manager Menu:
   Select Reminder Managers Menu Option: <mark>CP CPRS Reminder Configuration</mark>
       CA   Add/Edit Reminder Categories
       CL   CPRS Lookup Categories

CS   CPRS Cover Sheet Reminder List
MH   Mental Health Dialogs Active
PN   Progress Note Headers
RA   Reminder GUI Resolution Active
TIU   TIU Template Reminder Dialog Parameter
DL   Default Outside Location
PT   Position Reminder Text at Cursor
Select CPRS Reminder Configuration Option: **TIU TIU Template Reminder Dialog Parameter**
Reminder Dialogs allowed as Templates may be set for the following:
1 User   USR   [choose from NEW PERSON]
3 Service   SRV   [choose from SERVICE/SECTION]
4 Division   DIV   [choose from INSTITUTION]
5 System   SYS   [NATREM.FO-SLC.MED.VA.GOV]
Enter selection*: **5** *Choose the appropriate number for your site. Your site may do this by System or other levels. The example below uses SYSTEM level*

Setting Reminder Dialogs allowed as Templates for System:
Select Display Sequence: **?**

148   VA-VETERANS CHOICE NOTE
149   VA-TBI SCREENING
*When you type a question mark above, you will see the list of #'s (with dialogs) that are already taken. Choose a number **NOT** on this list. For this example, looking above I see the number 150 is not present, so I will use 150.*
Select Display Sequence: **150**
Are you adding 150 as a new Display Sequence? Yes// **Y YES**
Display Sequence: 150// **<Enter>**   150
Clinical Reminder Dialog**: type in the name of the dialog**
VA-POST 9/11 CASE MANAGEMENT SCREENING then **<enter>**
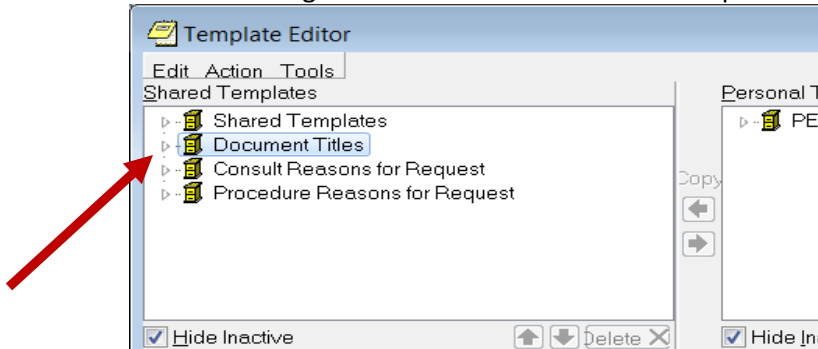OK? Yes// **<Enter>** (Yes)

3. **Setup of Note title**
    The Post 911 Case Management Screening note title should be created to be used with this reminder dialog template.

    Name: POST 911 CASE MANAGEMENT SCREENING
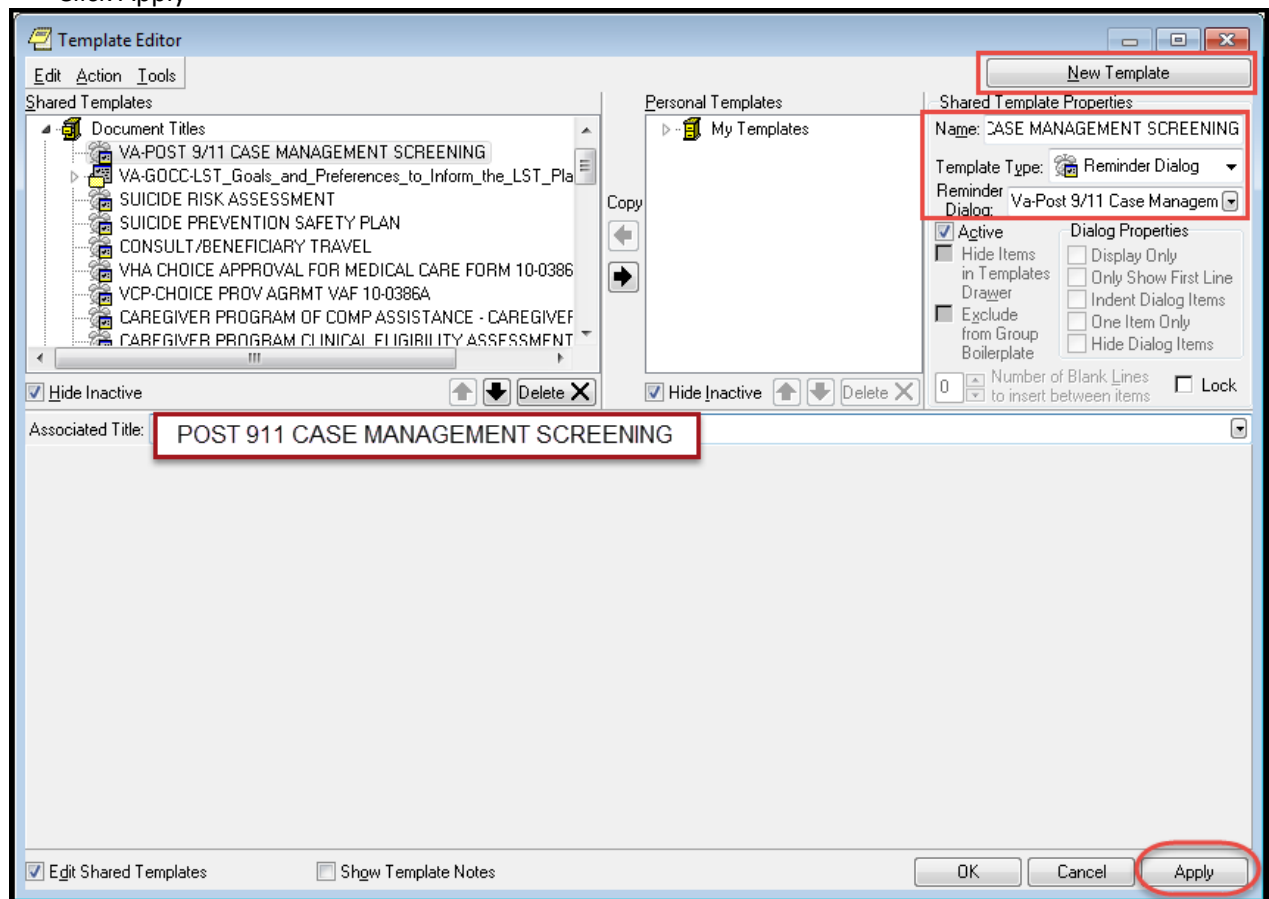   VHA Enterprise Standard Title: CASE MANAGER NOTE

    Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the TIU/ASU Implementation Guide.

4. **Associate the reminder dialog with the note title**
   - Open Template Editor
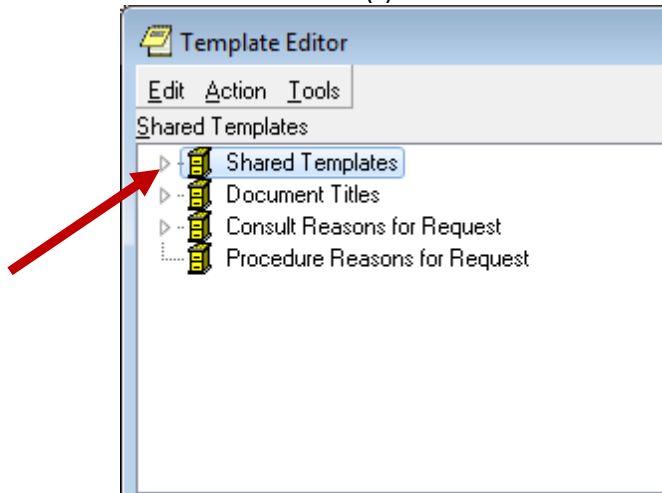   - Click 'triangle' to left of Document Titles to expand

   - Click New Template button
   - Type VA-POST 9/11 CASE MANAGEMENT SCREENING in the Name box
   - Click down arrow and Click on Reminder Dialog in Template Type Box
   - Type VA-POST 9/11 CASE MANAGEMENT SCREENING in Reminder Dialog box
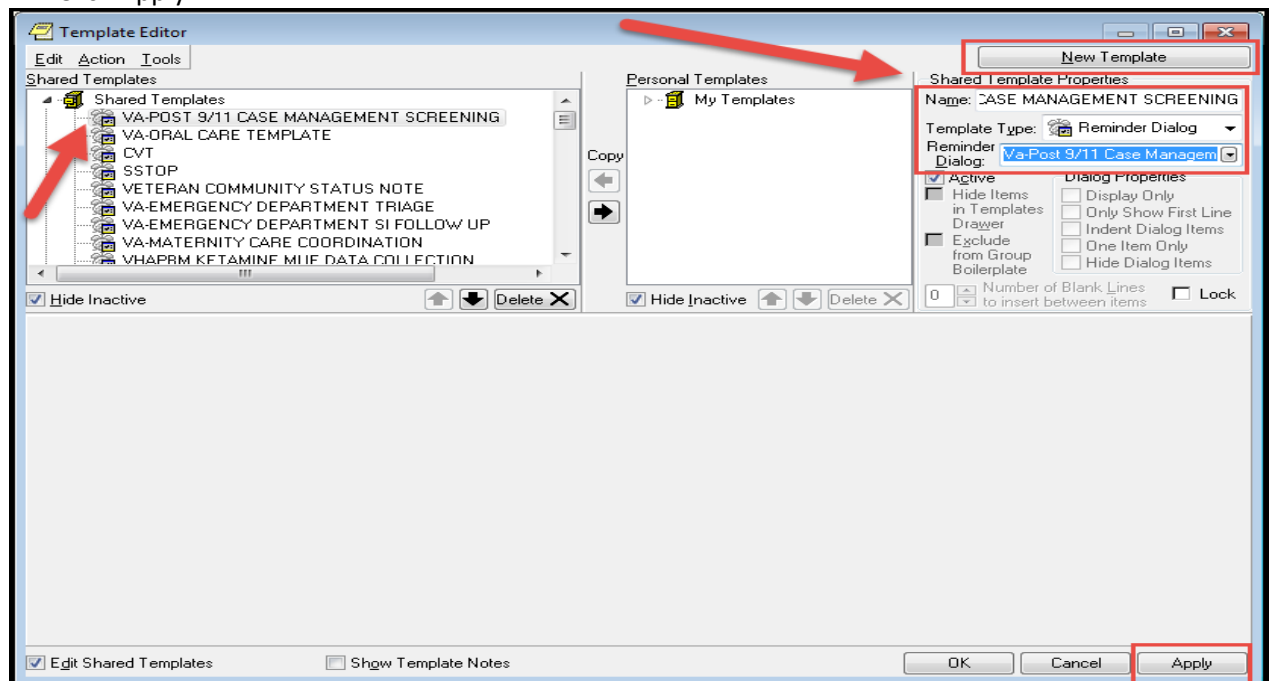   - Type POST 911 CASE MANAGEMENT SCREENING in Associated Title Box
   - Click Apply

Test the progress note title in CPRS to see new template is attached.

5. Add the reminder dialog template as a stand-alone shared template (OPTIONAL)

- Open Template Editor
- Click 'triangle' to left of Shared Templates to expand
- Select the folder(s) that the reminder dialog template should be located

- Click New Template button
- Type VA-POST 9/11 CASE MANAGEMENT SCREENING in the Name box
- Click down arrow and Click on Reminder Dialog in Template Type Box
- Type VA-POST 9/11 CASE MANAGEMENT SCREENING in Reminder Dialog box
- Click Apply

Test the shared template in CPRS to verify that the template opens when selected

NOTE: If you require further technical assistance, if there are any questions or problems during the installation, please notify your local IT support to log a national help desk ticket or contact the VA Service Desk and have them submit a national ticket to:
Category: Enterprise Applications
Subcategory: Applications
Enterprise Application: VistA - Clinical Reminders
Assignment Group: NTL SUP Clin 2