VA-VETERANS CHOICE NOTE
Reminder Dialog Template
Patch PXRM*2.0*56
Installation Guide

November 2014

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1. INTRODUCTION

 Public Law (P.L.) 113-146, the Veterans Access, Choice, and Accountability Act of 2014, which was enacted on August 7, 2014, and amended through the Department of Veterans Affairs Expiring Authorities Act of 2014 (P.L. 113-175), improves the access of eligible Veterans to health care through non-VA entities and providers. The law establishes the Veterans Choice Program, new documentation and reporting requirements, and the Veterans Choice fund. P.L. 113-146 did not change the eligibility requirements for enrollment in the VA health care system and did not modify VA's existing authorities to furnish non- VA care. On November 5, 2014, the Department of Veterans Affairs (VA) published an interim final rulemaking, AP24, that amends sections 17.108, 17.110, and 17.111 of title 38 of the Code of Federal Regulations (CFR) and establishes new regulations at 38 CFR 17.500 through 17.1540 to implement the Choice Program.

The purpose of the Veterans Choice progress note is to communicate appointment information and services approved. It may be used for care coordination activities and tracking/data mining. The Veterans Choice Note would be completed by the Non-VA Medical Care Coordination staff. They will document Pre and Post visit information for care coordination. The Health Factors "Veterans Choice List 30 Day and VC 40 Mile have been added to the template to facilitate tracking/data mining. The note will also be used for linking non-VA provider documentation scanned into VistA Imaging with the CPRS/TIU note. The progress note approach was chosen to avoid a complex Veterans Choice consult order/completion process. As with the overall process, the Veterans Choice Note template has been streamlined to minimize the impact on NVC staff. For additional information please contact David Brown: david.brown7@va.gov or Niki Gray: niki.gray@va.gov .

VA Links:
- **Veterans Access, Choice and Accountability Act (Choice Act) Home**
- **External Veterans Choice Program website for Veterans and Stakeholders**
- **Veterans Access, Choice and Accountability Act of 2014 Public Law PDF**

2. INSTALLATION:

This patch can be installed with users on the system. It is not necessary to be installed during non-peak hours. Estimated Installation Time: 1-2 minutes

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

1. **Retrieve the host file from one of the following locations (with the ASCII file type):**

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

2. **Install the patch first in a training or test account.**
Installing in a non-production environment will give you time to get familiar with new functionality and complete the setup for reminders and dialogs prior to installing the software in production.

3. **Load the distribution.**
    In programmer mode type, D ^XUP, select the Kernel Installation & Distribution System menu (XPD MAIN), then the Installation option, and then the option LOAD a Distribution.

Example
```
Select Installation Option: LOAD a Distribution
Enter a Host File: <Your Directory>PXRM_2_0_56.KID
KIDS Distribution saved on
```

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

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

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

Install the build.
From the Installation menu on the Kernel Installation and Distribution System (KIDS) menu, run the option Install Package(s). Select the build **PXRM*2.0*56** and proceed with the install. If you have problems with the installation, log a Remedy ticket and/or call the National Help Desk to report the problem.

```
Select Installation & Distribution System Option: Installation
Select Installation Option: INSTALL PACKAGE(S)
Select INSTALL NAME: PXRM*2.0*56
```

Answer "NO" to the following prompts:

    Want KIDS to INHIBIT LOGONs during install? NO// **NO**
    Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO// **NO**

NOTE: DO NOT QUEUE THE INSTALLATION

    Installation Example
    APPENDIX A

5. **Install File Print**
Use the KIDS Install File Print option to print out the results of the installation process.

```
Select Utilities Option: Install File Print
```
Select INSTALL NAME: PXRM*2.0*56

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

```
Select Utilities Option:  Build File Print
Select BUILD NAME: PXRM*2.0*56
DEVICE: HOME//
```

7. **Post-installation routines**

After successful installation, the following init routines may be deleted:

  PXRMP56E
  PXRMP56I

3. POST INSTALLATION INSTRUCTION

3.1 Enabling the Reminder Dialog in VistA

Before linking the dialog to a title or using it in Shared templates you must first add it into the TIU Template Reminder Dialog Parameter list.

```
^General parameter tools <enter>

List Values for a Selected Parameter
   List Values for a Selected Entity
   List Values for a Selected Package
   List Values for a Selected Template
   Edit Parameter Values
   Edit Parameter Values with Template
   Edit Parameter Definition Keyword
Select General Parameter Tools Option: EDIT Parameter Values

                    --- Edit Parameter Values ---


Select PARAMETER DEFINITION NAME: TIU TEMPLATE REMINDER DIALOGS    Reminder Dialogs
allowed as Templates
TIU TEMPLATE REMINDER DIALOGS 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    [TEST.V02.MED.VA.GOV]

Enter selection: 5   System

--- Setting TIU TEMPLATE REMINDER DIALOGS for System: the name of your system will
appear in this area

Select Display Sequence: ENTER A UNIQUE NUMBER (you may ? question mark this
option to obtain the list of templates associated with this parameter)


Are you adding (the new display sequence number) as a new Display Sequence? Yes//
select <enter> to confirm

        Clinical Reminder Dialog: VA-VETERANS CHOICE NOTE reminder dialog
        NATIONAL   type in the name of the dialog
          ...OK? Yes//   <Enter>
```
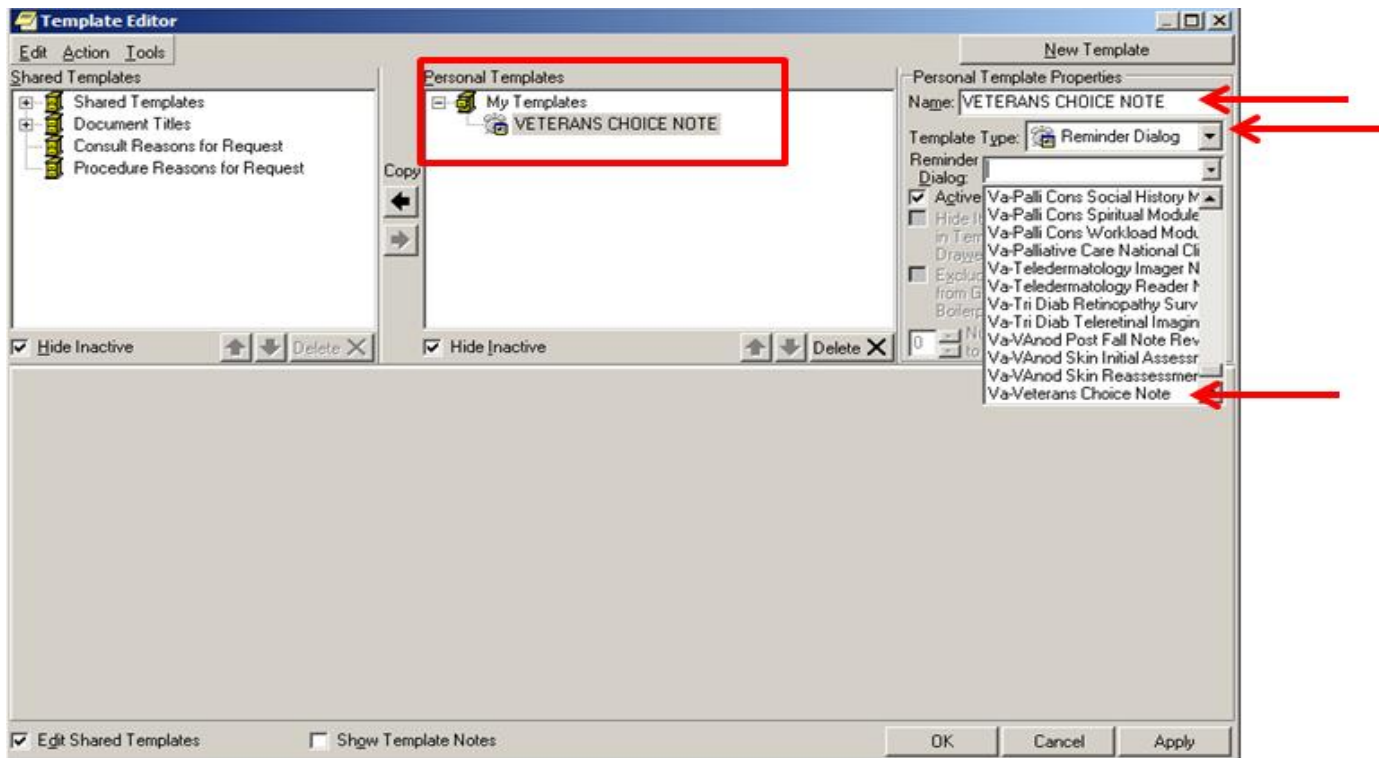
3.2 Placing the Reminder Dialog in CPRS

Link the dialogs from the CPRS TEMPLATE EDITOR.

- Open CPRS, select any patient and then the Notes tab.
- Open My Templates.
- Create a new template and give it an appropriate name (right side under Personal Templates).
- In the Template Type box select Reminder Dialog.
- Select the drop down arrow in the Reminder Dialog window and locate and select the VA-VETERANS CHOICE NOTE reminder dialog.
- Select the APPLY button.

After placing the reminder dialog in your personal templates you may want to take a few minutes to test the reminder to ensure it performs correctly (i.e. text wraps appropriately, health factors link to the note, etc.) before making it available for your clinical staff.

While using the CPRS Template Editor, if at any time the settings do not look correct, NEVER click the "Apply" button, but instead click "Cancel", then start over.

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3.5 Note Title

It is important to consult with the appropriate Health Information Management and/or Health Informatics Committee to determine if the creation of a new local note title is necessary and/or desired functionality at your facility.   Follow your facility's policy for creating a new local note title. For more information on TIU Note Title and Templates you may access the VHA HIMS Practice Brief - TIU TITLES AND TEMPLATES

Create the VETERANS CHOICE NOTE title using the instructions below. The VETERANS CHOICE NOTE must be mapped to the VHA Enterprise Standard Title of **NONVA NOTE.**

3.6 Creating a Note Title in Vista

Navigate to the Manager Document Definition Menu in Vista
```
Manager Document Definition Menu ---

    1      Edit Document Definitions
    2      Sort Document Definitions
    3      Create Document Definitions
    4      Create Objects
    5      Create TIU/Health Summary Objects

Select Document Definitions (Manager) <TEST ACCOUNT> Option: 3  Create Document
Definitions.

Create Document Definitions    Oct 24, 2014@08:36:50         Page:   1 of   1
                               BASICS

        Name                                                          Type
1       CLINICAL DOCUMENTS                                            CL
2         PROGRESS NOTES                                              CL
3         ADDENDUM                                                    DC
4         DISCHARGE SUMMARY                                           CL
5         SHERI'S CLASS                                               CL
6         ZZCONSULTS                                                  CL
7         MIKES TEST CLASS                                            DC
8         NANCY'S CLASS                                               CL
9         CLINICAL PROCEDURES                                         CL
10        SURGICAL REPORTS                                            CL
11        PAUL'S TEST CLASS                                           DC
```

```
New Users, Please Enter '?NEW' for Help                         >>>
    Class/DocumentClass      Next Level            Detailed Display/Edit
    (Title)                  Restart               Status...
    (Component)              Boilerplate Text      Delete


Select Action: Next Level// N=2  Select the number that corresponds to the document
class where the title should be placed
```

```
1       CLINICAL DOCUMENTS                                              CL
2         PROGRESS NOTES                                                CL
3           ADVANCE DIRECTIVE                                           DC
4           HISTORICAL TITLES                                           DC
5           CRISIS NOTE                                                 DC
6           CLINICAL WARNING                                            DC
7           ADVERSE REACTION/ALLERGY                                    DC
8           ADDICTION SEVERITY INDEX                                    DC
9           BLIND REHABILITATION SERVICE                                DC
10          SURGICAL                                                    DC
11          MEDICINE                                                    DC
12          INFECTIOUS DISEASE                                          DC
13          CHAPLAIN                                                    DC
14          NURSING
+         ?Help   >ScrollRight   PS/PL PrintScrn/List   +/-             >>>
      Class/DocumentClass        Next Level            Detailed Display/Edit
      (Title)                    Restart               Status...
      (Component)                Boilerplate Text      Delete
Select Action: Next Screen// n=12   Next Level  Depending on how your Document Hierarchy is
arranged you may need to open another level of Document Class
```

Create Document Definitions   Oct 24, 2014@08:43:19   Page: 1 of   1

```
                              BASICS

+       Name                                                          Type
2         PROGRESS NOTES                                              CL
3           NON VA CARE                                               DC
4             NEW TITLE INFECT                                        TL
5             PRIMARY CARE                                            TL


          ?Help   >ScrollRight   PS/PL PrintScrn/List   +/-             >>>
      (Class/DocumentClass)      Next Level            Detailed Display/Edit
      Title                      Restart               Status...
      (Component)                Boilerplate Text      Delete
Select Action: Title//    Title
 Enter the Name of a new NON VA CARE: VETERANS CHOICE NOTE
CLASS OWNER: CLINICAL COORDINATOR// CLINICAL COORDINATOR  Enter 'Owner" usually the
Clinical coordinator (it may differ in your system).
      1   CLINICAL COORDINATOR
      2   CLINICAL COORDINATOR -MGR
CHOOSE 1-2: 1  CLINICAL COORDINATOR
```
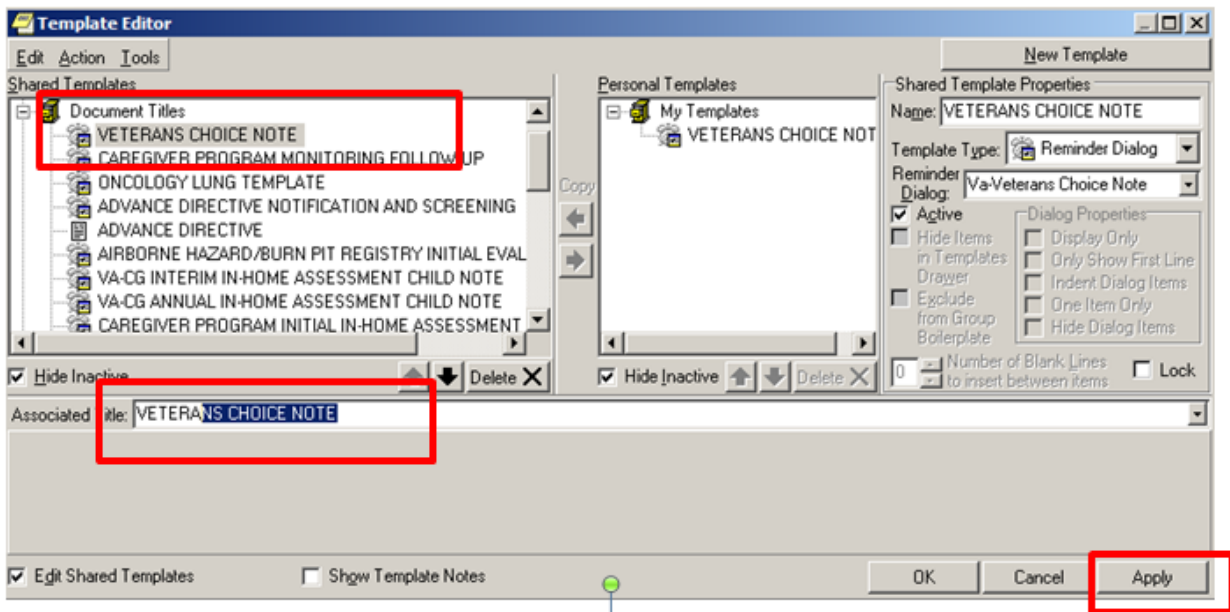
You MUST map your title to a VHA Standard Title
EVERY Local Title must be mapped to a VHA Enterprise Standard Title. VETERANS CHOICE NOTE
MUST be mapped to NONVA NOTE

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```
Direct Mapping to Enterprise Standard Title...
Your LOCAL Title is: VETERANS CHOICE NOTE

  NOTE: Only ACTIVE Titles may be selected...

Select VHA ENTERPRISE STANDARD TITLE: NONVA NOTE
```

```
          I found a match of: NONVA NOTE
              ... OK? Yes//    YES



          Ready to map LOCAL Title: VETERANS CHOICE NOTE to
VHA Enterprise Standard Title: NONVA NOTE

... OK? Yes//    YES
              Done.


STATUS: (A/I/T): INACTIVE// a  ACTIVE Entry Activated. Activate the note title so it is
selectable in CPRS

SEQUENCE: <ENTER>
MENU TEXT: Infectious Disease T  Replace <ENTER>

 Entry Created

Create Document Definitions   Oct 24, 2014@08:44:14        Page:    1 of    1
                              BASICS

+       Name                                                         Type
2         PROGRESS NOTES                                             CL
3           NON VA CARE                                              DC
4             VETERANS CHOICE NOTE                                   TL
5             NEW TITLE INFECT                                       TL
6             PRIMARY CARE                                           TL


    ?Help   >ScrollRight   PS/PL PrintScrn/List   +/-                >>>
     (Class/DocumentClass)      Next Level             Detailed Display/Edit
     Title                      Restart                Status...
     (Component)                Boilerplate Text       Delete
Select Action: Title//
```
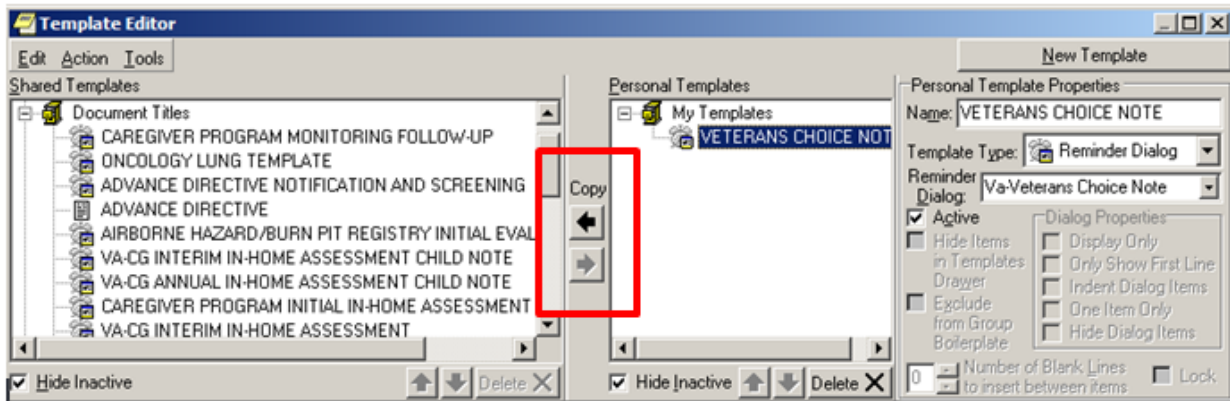
3.7 Linking the Reminder Dialog Template to a Note Title

The VA-VETERANS CHOICE NOTE reminder dialog template must be associated to the TIU note title VETERANS CHOICE NOTE.

- Access CPRS, select any patient and select the Notes tab.
- Select Options, Edit Shared templates.
- Select and open Document Titles (left side of the screen).
- On the right side the "My Templates" root of the template editor screen select the VETERANS CHOICE NOTE.
- Select the bold Copy arrow between the two panes, the template will copy over to the document titles.
- Select the VETERANS CHOICE NOTE under document titles, then in the Associated Title box type in the name of the title VETERANS CHOICE NOTE.
- Select Apply to save.

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4. GLOSSARY OF TERMS AND ABBREVIATIONS

CAC – Clinical Applications Coordinator

CDC – Centers for Disease Control and Prevention

CPRS – Computerized Patient Record System, previous version dating back to 1997 was CPRS List Manager (VistA terminal emulation only) and no longer supported but is still accessible in VISTA. CPRS GUI is the Windows version (since 1998), and is now called just CPRS (CPRS page on VDL web site)

CWAD – Special note titles that display in the POSTINGS window in the CPRS header. Each letter stands for a category: C = Crisis Notes; W = Clinical Warnings; A = Allergies/Adverse Drug Reactions (ADR); D = Advance Directives

Data Object – also called a 'Patient Data Object' or just as 'object'. These are either created by programmer (OI&T staff), or a CAC/HIS can create (TIU-HS object).

Dialog- A window in CPRS that opens in the format of a form to aid the user in creating text in a note and entering information into the record with a point and click interface.

Elements- A component in VistA that is configured to display content for the user when a dialog is opened.

FAQ – Frequently Asked Questions

FORUM – the VA's WAN (Wide Area Network), for mail, patch trackers, E3R repository

GUI – Graphical User Interface, referring to a Windows application

GUI Dialog Template/GUI Dialog - a CPRS template (plain text), TXML format, icons

Health Factor- Informational data marker entered into the record to document patient information that is not readily identifiable with other information data entries in the system. Health Factors are used in TIU-Health Summary objects, in Health Summary types, and for data capture (for VA Fileman queries/reports, VISN data warehouse data pulls, etc.)

HIS – Health Informatics Specialist, another title for Clinical Applications Coordinator (CAC) with same responsibilities as a CAC.

Health Summary (HS) – a clinical module (package) in VistA; GMTS is the package's name spacing (Health Summary page on VDL web site)

Health Summary Types/Objects - A collection of data that displays to the user specific to the patient's chart they are viewing.

Health Summary Type – a configuration of health summary components used as the basis of a report viewed in VISTA or the CPRS GUI, or used in a TIU-Health Summary object

Health Summary Object – the display settings of a Health Summary Type which is part of a TIU-Health Summary Object configuration.

Health Summary Component – an item that is used to create a health summary type (i.e., report). Health Summary components can be viewed via [GMTS HS ADHOC], or "List Health Summary Components [GMTS COMP LIST]", or "List Health Summary Component Descriptions [GMTS COMP DESC LIST]".

Host file – the file that is created in the reminder exchange option using .prd (Packed Reminder Definition format

KIDS- Kernel Installation Distribution System

Mapping - Linking of data markers such as Health Factors or other data entry items to reminder components such as reminder elements.

Name spacing – the prefixing, i.e., the initial 3-4 leading characters of a module or items in VistA

National Class - The highest collection of edit permissions which can be assigned to an item (versus VISN or LOCAL)

NCRC – National Clinical Reminder Committee

OPH – Office of Public Health

OIA – Office of Information and Analytics

OPC – Office of Primary Care

Packing List – the list of included items of a reminder exchange export when viewed from the 'IFE' action in the reminder exchange VISTA option

PCE – Patient Care Encounter (link to VDL web page)

PRD - **.**pdf file = Packed Reminder Definition (the alternate format for sending/receiving reminder exchange exports).

PXRM – namespace for the clinical reminders module   (clinical reminders page on VDL web site)

Reminder Taxonomy- Collection of specific codes associated with specific clinical conditions

Template- Commonly referred to as a dialog. See **dialog** for definition

Reminder Dialog - a template created in [PXRM DIALOG/COMPONENT EDIT]; can be used without reminder logic (reminder definition)

Reminder Dialog Template - a template created in [PXRM DIALOG/COMPONENT EDIT] and used in CPRS without linked reminder logic (reminder definition), either as a stand-alone template or the template is linked to a note title. Sometimes also referred to as a 'reminder template'.

Reminder Definition – used to create reminder logic for a clinical reminder or data object or reminder order check in PXRM REMINDER MANAGEMENT]

Reminder Exchange – the VISTA option [PXRM REMINDER EXCHANGE] used to create a reminder exchange message or .prd host file

Reminder Exchange Export – either a reminder exchange message or a .prd file moved out of the Reminder Exchange option in VISTA

Shared Templates- Templates within the shared templates tree of CPRS, which the users can access and use while documenting in the chart

SHOP-ALL – a destination through the VA's FORUM to access and download reminder exchange messages that have been posted and stored (uses Mailman; must have FORUM access)

TIU -Text Integrated Utility, the notes repository (clinical package) in VISTA   (TIU page on VDL web site)

TIU Document Definition – it can be a CLASS, DOCUMENT CLASS, TITLE or OBJECT (file #8925.1). The reminder exchange packing list shows the TIU object labeled as "TIU DOCUMENT DEFINITION".

TIU-Health Summary Object (also known as a TIU-HS OBJECT) – the link to TIU manual, ref (creating health summary objects)

TIU Object – a data object /patient data object (but too general a term to know if this is programmer-created or CAC/HIS-created). See DATA OBJECT above.

TIU Template – a TXML template (see TXML or GUI Dialog).

TXML - the file format of 'plain text' CPRS templates, aka "GUI dialogs" or "GUI Dialog Templates". Uses the CPRS GUI Template Editor to create and edit

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TIU TEMPLATE FIELD file - file #8927 in VISTA, where TIU template fields are stored

TIU TEMPLATE file – file #8927 in VISTA, where TXML templates are stored

User Acceptance Testing - (UAT) critical software testing where end-users test the software in real-world scenarios before it is nationally released

URL – Uniform Resource Locator, i.e., a specific web address (Internet or Intranet)

Usability Testing- evaluating the software by testing with a representation of users that follow specific tasks (test scripts), identify problems, suggest improvements and determine the user's satisfaction with the product.

VDL –The Internet page for all VISTA manuals and documentation   VistA Documentation Library

VMP- VistA Maintenance Project

APPENDIX A

Enter a Host File: <*your directory*>PXRM_2_0_56.KID

KIDS Distribution saved on Dec 03, 2014@08:36:30
Comment: VA-VETERANS CHOICE NOTE

This Distribution contains Transport Globals for the following Package(s):
Build PXRM*2.0*56 has been loaded before, here is when:
   PXRM*2.0*56   Install Completed
         was loaded on Dec 03, 2014@09:20:58
OK to continue with Load? NO// YES

Distribution OK!

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

  PXRM*2.0*56
Use INSTALL NAME: PXRM*2.0*56 to install this Distribution.

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

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

You've got PRIORITY mail!

Select Installation <TEST ACCOUNT> Option: INstall Package(s)
Select INSTALL NAME: PXRM*2.0*56   12/3/14@09:42:41
  => VA-VETERANS CHOICE NOTE ;Created on Dec 03, 2014@08:36:30

This Distribution was loaded on Dec 03, 2014@09:42:41 with header of
  VA-VETERANS CHOICE NOTE ;Created on Dec 03, 2014@08:36:30
  It consisted of the following Install(s):

PXRM*2.0*56
Checking Install for Package PXRM*2.0*56

Install Questions for PXRM*2.0*56

Incoming Files:

 811.8   REMINDER EXCHANGE (including data)
Note: You already have the 'REMINDER EXCHANGE' File.
I will OVERWRITE your data with mine.

Want KIDS to INHIBIT LOGONs during the install? NO//
Want to DISABLE Scheduled Options, Menu Options, and Protocols? NO//

Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.

DEVICE: HOME//   TELNET PORT

 Install Started for PXRM*2.0*56 :
          Dec 03, 2014@09:42:48

Build Distribution Date: Dec 03, 2014

 Installing Routines:
          Dec 03, 2014@09:42:48

 Running Pre-Install Routine: PRE^PXRMP56I

DISABLE options.

DISABLE protocols.

 Installing Data Dictionaries:
          Dec 03, 2014@09:42:48

 Installing Data:
          Dec 03, 2014@09:42:48

 Running Post-Install Routine: POST^PXRMP56I

ENABLE options.

ENABLE protocols.

There are 1 Reminder Exchange entries to be installed.
1. Installing Reminder Exchange entry PATCH PXRM*2.0*56 VA-VETERANS CHOICE
   NOTE

 Updating Routine file...

 Updating KIDS files...

 PXRM*2.0*56 Installed.
          Dec 03, 2014@09:42:54

 Not a production UCI

                    PXRM*2.0*56

Install Completed

APPENDIX B
REMINDER EXCHANGE Packing list

```
Description:
The following Reminder Dialog items were selected for packing:
REMINDER DIALOG

Keywords:

Components:

TIU TEMPLATE FIELD
   TIU TEMPLATE FIELD WORD PROCESSING 68 LENGTH 10 LINES
   TIU TEMPLATE FIELD VA-VETERANS CHOICE CLINICAL INFORMATION DISPLAY TEXT
   TIU TEMPLATE FIELD DATE/TIME REQ
   TIU TEMPLATE FIELD WORD PROCESSING 68 LENGTH 10 LINE INDENT REQ
   TIU TEMPLATE FIELD VA-VETERANS CHOICE APPROVED SERVICES SPECIFY
   TIU TEMPLATE FIELD TEXT 50 REQUIRED
   TIU TEMPLATE FIELD VA-VETERANS CHOICE ELIGIBILITY INFO HYPERLINK
   TIU TEMPLATE FIELD VA-VETERANS CHOICE HYPERLINK

HEALTH FACTORS
   Category: VETERANS CHOICE
   VCL 30 DAY
   VC 40 MILE
   VC SCANNED RESULTS

REMINDER SPONSOR
   Clinical Business Systems Office

REMINDER DIALOG
   VA-VETERANS CHOICE NOTE
   VA-DE VETERANS CHOICE ADDITIONAL COMMENTS
   VA-DE VETERANS CHOICE APPROVED SERVICES TEXT
   VA-DE VETERANS CHOICE APPROVED SERVICES TEXT
   VA-DE VETERANS CHOICE APPT D/T
   VA-DE VETERANS CHOICE CLINICAL INFO TEXT
   VA-DE VETERANS CHOICE POST VISIT SCANNED DOCUMENTATION
   VA-DE VETERANS CHOICE PROVIDER NAME
   VA-DE VETERANS CHOICE TEMPLATE INSTRUCTION TEXT
   VA-DE VETERANS CHOICE VC 40 MILE
   VA-DE VETERANS CHOICE VCL 30 DAY
   VA-DG VETERANS CHOICE ADDITIONAL COMMENTS
   VA-DG VETERANS CHOICE APPROVED SERVICES
   VA-DG VETERANS CHOICE APPT D/T
```

```
VA-DG VETERANS CHOICE EPISODE OF CARE
VA-DG VETERANS CHOICE INSTRUCTIONS
VA-DG VETERANS CHOICE MAIN
VA-DG VETERANS CHOICE POST VISIT TEXT
VA-DG VETERANS CHOICE POST-VISIT INFO
VA-DG VETERANS CHOICE PRE-POST SELECT
VA-DG VETERANS CHOICE PRE-VISIT INFO
VA-DG VETERANS CHOICE PROVIDER
```