



PHASER Implementation Guide
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Introduction

This document describes the steps for implementing PHASER pharmacogenomic (PGx) software and processes to enable PGx testing for Veterans. PGx testing is performed in cooperation with our partners, the Sanford Health Labs in Sioux Falls, SD. This document is intended for Site Coordinators and anybody else involved in establishing PHASER at a VA medical center. If you have comments or questions about the document please contact [Mike Naglich](#) or [Jennifer Chapman](#).

Internet and VA Intranet PHASER Resources

This is a list of key PHASER resources. You document should be read in conjunction with the [PHASER Project Blueprint](#).

Document Link	Description
PHASER CAC.HIS Program Set-Up Guide	CAC instructions for installing PHASER application components in VistA/CPRS. Look for update 112 in the VA's Online Documentation Library for Reminders: https://www.va.gov/vdl/application.asp?appid=60 .
PHASER Change Log	Log of changes made to the PHASER SharePoint site.
PHASER Core Team Training	List of training for PHASER core team members.
PHASER CPRS User Guide	CPRS guide for providers.
PHASER Dry Run Instructions	Steps in the PHASER Dry Run process.
PHASER Implementation Guide	Guide to implementing PHASER for new VA sites.
PHASER Installation Guide Errata	
PHASER Operations Guide	Guide to operations once live testing begins.
PHASER Patient FAQ	FAQ for Veterans.
PHASER Patient Post-Test Brochure	Tri-fold brochure with PHASER information for Veterans.
PHASER Patient Pre-Test Brochure	Tri-fold brochure mailed to Veterans along with their test results.
PHASER Presentation for Providers	PowerPoint presentation for provider training.
PHASER Project Blueprint	High-level description of PHASER project organization.
PHASER Project Blueprint – Monthly Report Template	Status report template for Site Coordinators.
PHASER Project Blueprint – Sample Project Plan	Example milestone plan for Site Coordinators.
PHASER Provider QuickGuide	One-page summary document for providers.
PHASER Provider Videos on YouTube	Links to 8 YouTube videos for providers.
PHASER Result Letter Template	Template for letter mailed to Veterans along with their test results.
PHASER VA-Sanford Health Lab Information	Information form required for connection with Sanford Health.
PHASER Weekly CDW Report Code Book	Weekly CDW report Excel file column descriptions.

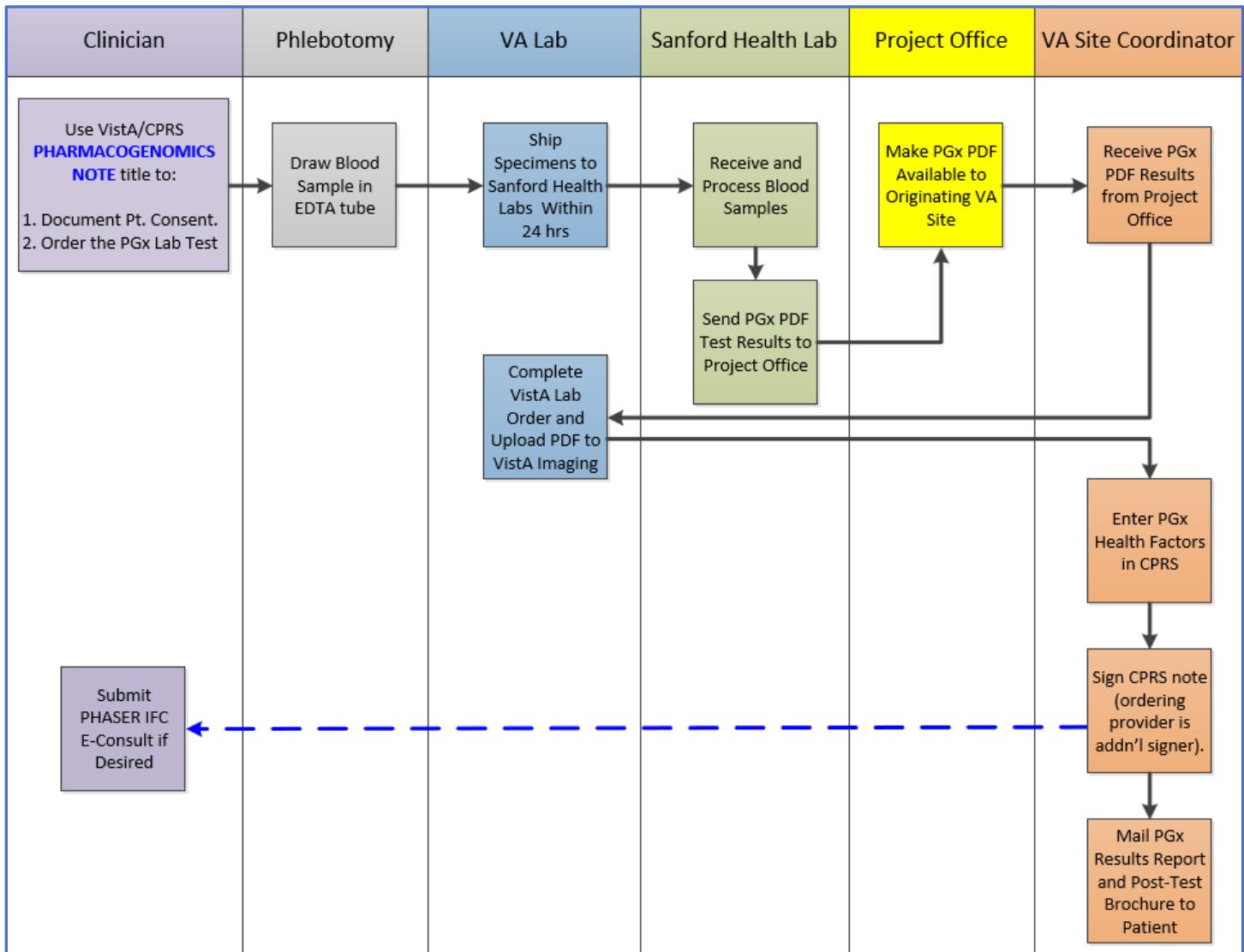
PHASER Implementation

The PHASER application consists of 4 main features.

1. **VistA/CPRS PHARMACOGENOMICS NOTE title and associated reminder dialog**, used to document patient consent, order the PGx lab test and enter test results. In addition to the note title and reminder dialog there are 4 related application elements.
 - I. Special VistA user class PGX AUTHORIZED STAFF is created and assigned to the Site Coordinator and anybody else who will enter PHASER test results returned by Sanford Health.
 - II. Shared network folder that defined by your IT staff and used to receive PDF files containing PHASER results along with related reports.
 - III. Administrative clinic used to create visits in CPRS that are required to enter PHASER results.
 - IV. Health Factors, which store PHASER results in the VistA electronic health record so they can be accessed by other software programs.
2. **VistA/CPRS Postings** – CPRS feature that enables providers to quickly determine a Veteran's PGx testing status.
3. **Interfacility Consult (IFC)** – Also known as an *E-consult*, this is a CPRS consult available for clinicians at any PHASER site to request a consultation with a Pharmacist trained in pharmacogenomics.
4. **Reporting** – Performance and Quality Improvement metrics made available to your team to assist with monitoring PGx operation.

Workflow Overview

This diagram summarizes the workflow you will establish at the start of your PHASER project. As described in following sections, an end-to-end test of this workflow, called the **Dry Run**, is conducted as the final step before live testing of Veterans can begin. See the [PHASER Operations Guide](#) for details of the individual process steps.



Roles and Responsibilities

People in the following roles are responsible for different aspects of PHASER implementation and operation. A person may fill more than one role, depending on how your location organizes the project.

Role Identifier	Description
Computer Applications Coordinator (CAC)	Completes the tasks listed in the PHASER CAC.HIS Program Set-Up Guide .
Lab Information Manager (LIM)	Defines the PGx lab orderable item in VistA.
PHASER Project Office	The Project Office is responsible for PHASER deployment across the VA. Names and contact information are listed in Appendix A – Contacts on page 10.
Office of Information and Technology's (OIT)	The national technical team responsible for distribution and support of the PHASER reminder dialog and related deliverables.
Result Processor	<ul style="list-style-type: none"> • Receive PGx PDF test results PHASER project office. People in this role must be defined be in the PGX AUTHORIZED STAFF User Class. • Work with the VA Lab Staff as needed to ensure PHASER PDF reports are loaded to VistA Imaging. • Enter PHASER results in a CPRS progress note using the PHARMACOGENOMICS NOTE title, sign the note, and make the ordering provider an additional signer to notify them results are available. • Mail test results to Veterans. • Result Processors also received a weekly cumulative report of all PGx lab orders.
Sanford Health Lab	<ul style="list-style-type: none"> • Provide PGx requisition forms and shipping kits to VA PHASER sites. • Provide support for ordering supplies and answering questions about specimen shipments via the Client Support Line at 1-877-392-1234. • Receive PGx specimens, analyze them, and return results.
VA Lab Staff	<ul style="list-style-type: none"> • Ship specimens to Sanford Health Labs in Sioux Falls, SD. • Manage PGx orders in the VistA Lab package. • Load PHASER PDF result documents to VistA Imaging.

Project Milestones

This section breaks the implementation effort into phases composed of related milestones to give you a better idea of what is required so you can begin organizing your project. The work shown below takes roughly 6 to 12 weeks, and the order of the milestones shown can be changed to suit your circumstances. Focus on these important tasks first:

- Work with your CAC and LIM to have the installation tasks described in the [PHASER CAC.HIS Program Set-Up Guide](#) started as soon as possible.
- Fill-out and submit the [PHASER VA-Sanford Health Lab Information Form](#) as soon as possible so Sanford Health can print you custom PHASER requisition forms and send them along with your initial supply of shipping kits.
- Submit a request for a shared network folder as described in **Appendix C - PHASER Shared Network Folder Requirements** on page 12.
- Identify an existing VistA/CPRS administrative clinic, or have a new PHASER administrative clinic defined. Talk to your CAC if you need help figuring out who to ask for help with this task. It is not something CAC's usually handle, but they will know who does.

#	Milestone Name	Task Owner	Notes
	Orientation		
1	Orientation Meeting Scheduled	Project Office	1
2	Deliver pre-orientation meeting material	Project Office	1
3	Core Team starts PHASER self-study training	Core Team	1
4	Conduct Orientation Meeting	Project Office	1
	Implementation		
5	Identify CAC, LIM, and Lab members for PHASER team	Site Coordinator	
6	Establish online repository for PHASER project documents	Site Coordinator	
7	Establish PHASER Facility Steering Committee	Site Champions	1
8	Schedule PHASER project kickoff meeting	Site Coordinator	
9	Schedule repeating PHASER status meeting for Core Team	Site Coordinator	
10	Conduct PHASER project kickoff meeting	Site Coordinator	
11	Deliver first PHASER monthly status report	Site Coordinator	1, 2
12	Submit request for shared network folder	Site Coordinator	3
13	Identify PHASER VistA/CPRS administrative clinic	Site Coordinator	4
14	Submit VA-Sanford Health laboratory information form	Site Coordinator	5
15	Request first supply of shipping kits and requisition forms from Sanford Health	Lab	
16	Establish plan for Lab staff PHASER training	Site Coordinator	
17	Customize the patient cover letter for PGx test result mailing	Site Coordinator	6
18	Customize the Provider Quick Guide for local use	Site Coordinator	7
19	Review in-service training material for providers and Pharmacists	Site Coordinator	8
20	Define VistA Lab package PGx lab test orderable item	LIM	9
21	Install the VA-PHASER TEMPLATE reminder dialog in VistA	CAC	10
22	Create the PHARMACOGENOMICS NOTE title and associate the reminder dialog	CAC	10
23	Define the PGx AUTHORIZED STAFF VistA user class	CAC	10
24	Create PGx lab quick order and attach to reminder	CAC	10
25	Establish the IFC Pharmacogenomics E-Consult title and menu selection	CAC	10
26	Provide CAC with list of people requiring PGx AUTHORIZED STAFF	Site Coordinator	4
27	Assign PGx AUTHORIZED STAFF in VistA profile	CAC	10
28	Verify PGx AUTHORIZED STAFF access	Site Coordinator	4
29	Verify PGx lab order is only accessible through the PHASER reminder dialog	Site Coordinator	11
30	Verify function of PHARMACOGENOMICS NOTE to document consent and order PGx test	Site Coordinator	12

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#	Milestone Name	Task Owner	Notes
31	Verify function of PHARMACOGENOMICS NOTE to enter Health Factors in CPRS	Site Coordinator	4
32	Implement PHASER Postings feature in VistA	CAC	10
33	Verify function of PHASER Postings feature	Site Coordinator	12
34	Obtain supply of legal-size envelopes for mailing PHASER results	Site Coordinator	13
34.5	Print a supply of pre-test and post-test brochures and patient FAQ's.	Site Coordinator	17
35	Identify color printer used to print patient PHASER reports for mailing	Site Coordinator	14
36	Confirm lab receipt of initial PHASER shipping kit supply	LAB	
37	Conduct test of shared network folder with PHASER project office	Site Coordinator	
38	Meet with Mike Naglich to review the Dry Run readiness checklist	Site Coordinator	15
39	Pre-Dry Run test of PHASER workflow, from consent through result processing	Site Coordinator	4
40	Notify PHASER team members of Dry Run date and project Go-Live date	Site Coordinator	
41	Schedule project review with PHASER project office for Go-Live + 1 month	Site Coordinator	1
Dry Run			16
42	Identify test patient and inform Lab to expect a PHASER order	Site Coordinator	
43	Order PGx test in CPRS using PHASER reminder dialog	Core Team	
44	Ship dummy test specimen to Sanford Health lab	Lab	
45	Receive test PGx PDF result report from the PHASER project office	Site Coordinator	
46	Load test PGx PDF report to VistA Imaging	Lab	
47	Complete the PHASER order in the VistA Lab package.	Lab	
48	Record Health Factors for test patient in CPRS	Site Coordinator	
49	Perform steps to mail test results to a patient	Site Coordinator	
50	Notify PHASER project office that lab order is complete and Health Factors entered	Site Coordinator	
51	Project office reports dry run results (usually takes 1-2 days)	Project Office	
52	Announce PHASER is available for live testing	Site Coordinator	
PHASER Deployment			
53	Continue monthly status reporting	Site Coordinator	
54	Conduct project review with PHASER project office (Go-Live + 1 month)	Site Coordinator	1
55	Continue with previously planned PHASER roll-out	Core Team	1

Notes

1. These milestones are discussed in the [PHASER Project Blueprint](#).
2. For more details see [PHASER Project Blueprint – Monthly Report Template](#).
3. See **Appendix C - PHASER Shared Network Folder Requirements** on page 12.
4. See the [PHASER Operations Guide](#) for more information.
5. Follow the instructions in the [PHASER VA-Sanford Health Lab Information](#) form on the PHASER SharePoint site to establish your connection with the Sanford Health Lab in Sioux Falls, SD. Your Lab may require a copy of the technical specification for PGx test. A copy is one the SharePoint site: [PHASER 11-Gene Technical Specification.pdf](#).
6. The cover letter template and other Veteran-oriented documents are: [here](#).
7. Link to [PHASER Provider QuickGuide](#).
8. Provider training material is: [here](#).
9. Link to the [PHASER PGx Lab Package Definition](#).
10. CAC instructions are in the [PHASER CAC.HIS Program Set-Up Guide](#).
11. The PGx lab should only be ordered using the PHASER reminder dialog as described in the PHASER CPRS User Guide. It should not be available to order outside the reminder dialog. Please ensure your LIM and CAC are aware it should be restricted to 'quick order only', and the only place the quick order should appear is in the PHASER reminder dialog. This ensures providers will be prompted to document patient consent before ordering the lab test.
12. See the [PHASER CPRS User Guide](#) for details.

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13. These are standard items that can be ordered locally. Check with local administrative staff if you need help.
14. The 2-page patient report is printed in color and mailed to the patient. Link to a [sample patient report](#).
15. See **Appendix D - Dry Run Readiness Checklist** on page 14 for a copy of the checklist.
16. For details see [PHASER Dry Run Instructions](#).
17. Links to the documents:
 - [Pre-test brochure](#).
 - [Post-test brochure](#).
 - [Patient FAQ](#).

Appendix A – Contacts

Please contact any of VA PHASER Project Office staff listed below if you have other question.

Role	Name	Phone	Email
VA PHASER National Program Director, Durham VA PHASER Site Champion	Dr. Deepak Voora, MD	919-286-0411 X-175214	deepak.voora@va.gov
VA PHASER National Deployment Coordinator	Mike Naglich	919-225-3733	michael.naglich@va.gov
VA PHASER Pharmacy Program Manager	Jill Bates Pharm.D., M.S., BCOP, FASHP	919-286-0411 X-172213	jill.bates@va.gov
VA PHASER National Project Manager	Jennifer Chapman	919-286-0411 X-176181	jennifer.chapman2@va.gov
VA PHASER Project Management Assistant	Hope McFarland		hope.mcfarland@va.gov

Appendix B – PHASER Listservs

PHASER makes use of two VA internal listservs to communicate with different audiences as described below. General information about this VA service is available at <https://vaww.listserv.va.gov/>.

Both listservs support two-way communication. That is, if any member of either listserv sends a message, all members of that listserv receive a copy and can reply. This is intended to promote information sharing and collaboration across sites.

PHASER-L Listserv for Providers

This listserv is used to send information on the clinical application of pharmacogenomic test results to clinical practice. When a provider attends an in-service or orders their first PGx test they are automatically added as a member but can opt out at any time. Details are on the PHASER SharePoint site in document [PHASER PHASER-L Listserv Information.pdf](#).

NOTE: The Project Office requests that you send electronic versions of the attendance sheet for any training or in-service conducted for providers so the attendees can be added to PHASER-L. The attendance sheet template provided on the SharePoint site in [PHASER Attendance Sheet Template.docx](#) also enables providers to sign up for patient pre-visit mailings. Please contact the Project Office if you have questions.

VA-PGX-L Listserv for Support Staff

The membership of this listserv consists of Site Coordinators and PGx Result Processors, although anybody interested is welcome to join. Site Coordinators and PGx Result Processors are enrolled automatically and should review any messages they receive.

Non-clinical information, such as the availability of new document versions, information related to specimen shipping, information about the PHASER reminder dialog, and other topics that are not of interest to clinicians are sent via this listserv. The information in document [PHASER PHASER-L Listserv Information.pdf](#) also applies to this listserv, just replace ‘PHASER-L’ with ‘VA-PGX-L’ and the commands are the same.

Appendix C - PHASER Shared Network Folder Requirements

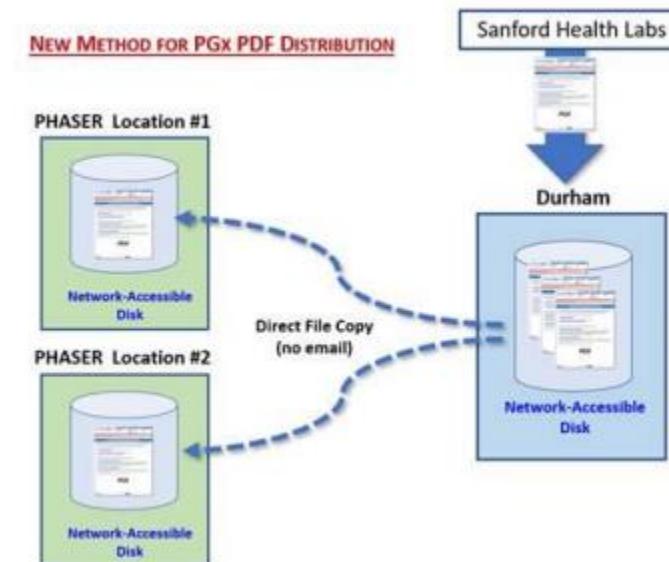
PHASER test results and order reports are copied to a network folder accessible to both the PHASER project office and your site's PHASER team. Each PHASER Site Coordinator must submit an IT request at your location to provide access to a shared network folder that satisfies the following requirements. When the folder is ready send a link to Mike Naglich, Jennifer Chapman, and Catherine Chanfreau so they can verify their access.

1. Documents containing PHI (e.g. the test results for Veteran's) can be stored there.
2. There is enough space to store the maximum anticipated number of files.
3. The following people from the PHASER project office should be granted remote access and have permission to read from and create files in the shared network folder and any subfolders.

Role	Name	Email	VA alias	Phone
PHASER Data Scientist	Catherine Chanfreau	catherine.chanfreau@va.gov	VHAGLACHanfC	(w) 310-478-3711 Ext.49998
PHASER Project Manager	Jennifer Chapman	Jennifer.Chapman2@va.gov	VHADURChapmJ	(w) 919-286-0411 Ext.176181
PHASER Deployment Lead	Mike Naglich	michael.naglich@va.gov	VHADURNagliM	(m) 919-225-3733

Note: you can find the VA Alias in the MS Outlook address book as shown below under **Find the VA Alias in Outlook** Your IT staff needs the VA Alias to define the security rules that allow people to access the shared folder.

4. The PHASER Site Coordinator, their backup, and anybody at your location who should the PGx PDF results sent by Sanford Health need the same access as the project office described above.
5. Whoever is responsible for loading PGx PDF's into VistA Imaging needs the same access as everybody else. Usually this is done by laboratory staff, but at some locations it's done by the Site Coordinator or Health Information Services staff, so do whatever is appropriate for your location.



Find the VA Alias in Outlook

This screen clip shows where to find the VA Alias in the Outlook Global Address List.

The screenshot shows the Microsoft Outlook "Address Book: Global Address List" window. The search bar at the top contains "naglich". The results list shows a contact for "Naglich, Michael D." with the title "PHASER National Site Coordinator". The "Alias:" field is highlighted with a yellow box, containing the value "VHADURNagliM".

Name	Title	Business Phone	Location	Department
Naglich, Michael D.	PHASER National Site Coor...	919-286-0411 x-179945	Texas Valley Coastal ...	VHA
	CAC Information Nurse	028-730-9204	IHC	VHA

Naglich, Michael D.
PHASER National Site Coordinator

General Organization Phone/Notes Member Of E-mail Addresses

Name
First: Michael Initials: D Last: Naglich
Display: Naglich, Michael D. Alias: VHADURNagliM

Address: 508 Fulton Street
Building No: Legacy Title: PHASER National Site Coord
Company: Department Of Veterans Aff

Appendix D - Dry Run Readiness Checklist

This is a checklist of items to complete before conducting a PHASER dry run. The date for the dry run date must be coordinated with the PHASER project office. The dry itself usually takes 2-3 days in order to verify backend data transmission to the VA Corporate Data Warehouse functions correctly. Written confirmation of dry run success is required before testing of Veterans can begin.

Complete	#	Item
	1	Laboratory information form completed and sent to Sanford Health and the PHASER project office.
	2	Shared network folder available and confirmed accessible by the PHASER project office.
	3	The following templates tailored for your location: <ul style="list-style-type: none">• Provider Quick Guide.• PHASER Veteran results cover letter.• PHASER pre-appointment mailing cover letter.
	4	Administrative clinic for entering PHASER results identified.
	5	PHASER quick order menu displayed correctly.
	6	PHARMACOGENOMICS NOTE title and reminder dialog available in CPRS.
	7	Primary and backup assigned to enter PHASER results and assigned to the PGX AUTHORIZED STAFF user class.
	8	PHARMACOGENOMICS (PGX) E-CONSULT note title available in CPRS.
	9	PHASER e-consult menu choice available in CPRS.
	10	Lab supplied with specimen shipping kits and requisition forms.
	11	Lab staff PHASER training complete (see the PHASER Operations Guide for more information).
	12	Lab staff prepared to ship a dummy PHASER specimen for the dry run as described in the PHASER Dry Run Instructions document. <ul style="list-style-type: none">• Make sure the Lab knows which test patient will be used to submit the lab order since they normally ignore orders for test patients.• The Lab must also complete the PGx order in the Lab package when the results is returned by Sanford Health.
	13	Using a test patient, the Site Coordinator has documented consent, ordered the lab test, and entered results in CPRS for both inpatient and outpatient settings.
	14	The PHASER Postings feature is active and functions as described in the PHASER CPRS User Guide .
	15	The PHASER project office confirmed that everybody assigned to the PGX AUTHORIZED STAFF user class has been added to the VA-PGX-L listserv.
	16	Site Coordinator confirms understating of the VA-PGX-L and PHASER-L listservs and their different purposes.
	17	Site Coordinator has a supply of legal-size envelopes and access to color printer for printing and mailing results.
	18	Workflow established to perform and track the following tasks: <ul style="list-style-type: none">• Receive PHASER result PDF's from the PHASER project office.• Load PDF result files into VistA Imaging• Enter Health Factors in CPRS.• Mail 2-page PHASER result patient report, cover letter, and post-test brochure, to patients using the MS Word mail merge function.
	19	Site Coordinator and Mike Naglich met to review the PHASER Dry Run Instructions document and confirm the target dry run date.

