VistA

Update _2_0_364

Clinical Reminders

VA-GEC CLC STANDARDIZED CONSULT NOTE

Install Guide

May 2024

Product Development
Office of Information Technology
Department of Veterans Affairs

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Introduction

This template's purpose is to establish a standardized template and process for CLC Referrals which will provide relevant information to the Admissions Screening Team in the CLC and enable, at the local, VISN and National level the ability to obtain data concerning who is being referred to the CLC, the level of care they need, goals of care and to identify consistent patterns or referrals for future resource requests.

End-users of these templates include primary care, inpatient and CLC staff, including ordering providers, social workers, and nursing staff responsible for referring a patient to a CLC.

UPDATE_2_0_364 contains 1 Reminder Exchange entry:
> **UPDATE_2_0_364 VA-GEC CLC STANDARDIZED CONSULT NOTE**

The exchange file contains the following components:

TIU TEMPLATE FIELD

> TEXT (1-75 CHAR) REQ
> WORD PROCESSING (REQ)
> VA-DURATION
> WORD PROCESSING (REQUIRED)
> TEXT (1-70) REQUIRED
> VA-GEC HALLUCINATIONS
> VA-GEC WANDERING
> TEXT (1-60 CHAR)1
> VA-SKILLED CARE NEEDS

HEALTH FACTORS
> VA-REMINDER UPDATES [C]
> VA-UPDATE_2_0_364
> VA-CLC PREADMISSION SCREEN [C]
> VA-CLC MOVING INDOORS DEPENDENT
> VA-CLC MOVING INDOORS MAX ASSIST
> VA-CLC MOVING INDOORS MOD ASSIST
> VA-CLC MOVING INDOORS MIN ASSIST
> VA-CLC MOVING INDOORS INDEPENDENT
> VA-CLC TRANSFER DEPENDENT
> VA-CLC TRANSFER MAX ASSIST
> VA-CLC TRANSFER MOD ASSIST
> VA-CLC TRANSFER MIN ASSIST
> VA-CLC TRANSFER INDEPENDENT

VA-CLC TOILET DEPENDENT
VA-CLC TOILET MAX ASSIST
VA-CLC TOILET MOD ASSIST
VA-CLC TOILET MIN ASSIST
VA-CLC TOILET INDEPENDENT
VA-CLC EATING DEPENDENT
VA-CLC EATING MOD ASSIST
VA-CLC EATING MIN ASSIST
VA-CLC EATING INDEPENDENT
VA-CLC DRESSING DEPENDENT
VA-CLC DRESSING MAX ASSIST
VA-CLC DRESSING MOD ASSIST
VA-CLC DRESSING MIN ASSIST
VA-CLC DRESSING INDEPENDENT
VA-CLC BATHS DEPENDENT
VA-CLC BATHS MAX ASSIST
VA-CLC BATHS MOD ASSIST
VA-CLC BATHS MIN ASSIST
VA-CLC BATHS INDEPENDENT
VA-CLC LOC COMMUNITY NURSING HOME
VA-CLC LOC HBPC
VA-CLC LOC VA DOMICILIARY
VA-CLC LOC COMMUNITY HOSPITAL
VA-CLC LOC OUTPT CLINIC

REMINDER DIALOG
VA-GEC CLC STANDARDIZED CONSULT NOTE

REMINDER TERM
VA-REMINDER UPDATE_2_0_364

Pre-Installation

1. Identify the local community living center (CLC) admission consult order.
2. Identify local Life-Sustaining Treatment Note title.
3. Identify local Advance Directive note title.

Install Details

This update is being distributed as a web host file. The address for the host file is:
https://REDACTED/UPDATE_2_0_364.PRD

```
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              RP    Repack
Select Action: Next Screen// LWH    Load Web Host File
```

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 10 minutes.

Install Example

Search and locate an entry titled **UPDATE_2_0_364 VA-GEC CLC STANDARDIZED CONSULT NOTE** in reminder exchange.

```
+Item   Entry                          Source                    Date Packed
   413   UPDATE_2_0_364 VA-GEC CLC
         STANDARDIZED CONSULT NOTE
   414   UPDATE_2_0_365 VA-LONG
         COVID-19 CONSULT RESPONSE
   415   UPDATE_2_0_365 VA-LONG
         COVID-19 CONSULT RESPONSE
   416   UPDATE_2_0_365 VA-LONG
         COVID-19 CONSULT RESPONSE
   417   UPDATE_2_0_366 VA-MEDICATION
         INFORMATION MANAGEMENT
+           + 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              RP    Repack
Select Action: Next Screen// IFE    Install Exchange File Entry
Enter a list or range of numbers (1-634): 413
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry UPDATE_2_0_364 VA-GEC CLC STANDARDIZED CONSULT NOTE *(in this example it is entry 413 it will vary by site).* The date of the exchange file should be 05/02/2024.

```
Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-GEC CLC STANDARDIZED CONSULT NOTE

REMINDER TERM
  VA-REMINDER UPDATE_2_0_364

Keywords:

Components:

+           + Next Screen    - Prev Screen    ?? 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**

Skip the OB AUDC Health Summary Type if asked to overwrite.

HEALTH SUMMARY TYPE entry named OB AUDC already exists but the packed
component is different, what do you want to do?

   Select one of the following:

      C   Create a new entry by copying to a new name
      O   Overwrite the current entry
      U   Update
      Q   Quit the install
      S   Skip, do not install this entry

Enter response: O// Skip

For other components that already exists but the packed component is different, you will choose
OVERWRITE.

**You will be promped to install the reminder dialog components– You will choose
to install all even though some components may have an X to indicate that they
exist.**

```
Packed reminder dialog: VA-GEC CLC STANDARDIZED CONSULT NOTE [NATIONAL DIALOG]

 Item  Seq. Dialog Findings                                    Type     Exists
    1      VA-GEC CLC STANDARDIZED CONSULT NOTE                dialog

    2    5 VA-GEC CLC STANDARDIZED CONSULT VERSION             element
            Finding: *NONE*

    3    7 VA-GEC CLC GOALS                                     group
            Finding: *NONE*
    4    7.5 VA-GEC CLC GOALS REHAB                            element
            Finding: *NONE*
    5    7.10 VA-GEC CLC GOALS SKILLED NURSING                 element
            Finding: *NONE*
    6    7.15 VA-GEC CLC GOALS MONITOR                         element
            Finding: *NONE*
    7    7.20 VA-GEC CLC GOALS COMPLIANCE                      element
            Finding: *NONE*
+         + 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-GEC CLC STANDARDIZED CONSULT NOTE**

Select Action: Next Screen// IA   Install All
Install reminder dialog and all components with no further changes: Y// Yes

```
Packed reminder dialog: VA-GEC CLC STANDARDIZED CONSULT NOTE [NATIONAL DIALOG]
VA-GEC CLC STANDARDIZED CONSULT NOTE (reminder dialog) installed from exchange f
 Item  Seq. Dialog Findings                                    Type     Exists
    1      VA-GEC CLC STANDARDIZED CONSULT NOTE                dialog    X

    2    5 VA-GEC CLC STANDARDIZED CONSULT VERSION             element   X
            Finding: *NONE*

    3    7 VA-GEC CLC GOALS                                     group    X
            Finding: *NONE*
    4    7.5 VA-GEC CLC GOALS REHAB                            element   X
            Finding: *NONE*
    5    7.10 VA-GEC CLC GOALS SKILLED NURSING                 element   X
            Finding: *NONE*
    6    7.15 VA-GEC CLC GOALS MONITOR                         element   X
            Finding: *NONE*
    7    7.20 VA-GEC CLC GOALS COMPLIANCE                      element   X
            Finding: *NONE*
+         + 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
```

After completing this dialog install, you will type Q.

```
Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-GEC CLC STANDARDIZED CONSULT NOTE

REMINDER TERM
  VA-REMINDER UPDATE_2_0_364

Keywords:

Components:

+          + Next Screen   - Prev Screen   ?? More Actions              >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// Q
```

You will then be returned to this screen. At the **Select Action** prompt, type **Q.**

Install complete.

Post Installation

1. **Map local CLC admission consult order to VAL-GEC CLC CONSULT ORDER element.**

    NAME: **VAL-GEC CLC CONSULT ORDER**
    DISABLE:
    CLASS: LOCAL//
    SPONSOR:
    REVIEW DATE:
    RESOLUTION TYPE:
    ORDERABLE ITEM:
    FINDING ITEM: **Enter "Q." then name of local CLC admission consult order**

2. **Map the local Life-Sustaining Treatment Note title to the VAL-OBJ LAST LST NOTE DATE**

    Begin in the Reminder Manager Menu in VistA

      CF   Reminder Computed Finding Management ...

```
RM     Reminder Definition Management ...
SM     Reminder Sponsor Management ...
TXM    Reminder Taxonomy Management
TRM    Reminder Term Management ...
LM     Reminder Location List Management ...
RX     Reminder Exchange
RT     Reminder Test
OS     Other Supporting Menus ...
INFO   Reminder Information Only Menu ...
DM     Reminder Dialog Management ...
CP     CPRS Reminder Configuration ...
RP     Reminder Reports ...
MST    Reminders MST Synchronization Management ...
PL     Reminder Patient List Menu ...
PAR    Reminder Parameters ...
VS     NLM Value Set Menu
ROC    Reminder Order Check Menu ...
CQM    NLM Clinical Quality Measures Menu
XM     Reminder Extract Menu ...
```

Select Reminder Managers Menu <TEST ACCOUNT> Option: **RM** Reminder Definition Management

```
RL     List Reminder Definitions
RI     Inquire about Reminder Definition
RE     Add/Edit Reminder Definition
RC     Copy Reminder Definition
RA     Activate/Inactivate Reminders
RH     Reminder Edit History
ICS    Integrity Check Selected
ICA    Integrity Check All
PNE    Definition Print Name Edit
PNR    Definition Print Name Report
```

Select Reminder Definition Management <TEST ACCOUNT> Option: **RE** Add/Edit Reminder Definition

Select Reminder Definition: **VAL-OBJ LAST LST NOTE DATE**

   Select one of the following:

        A   All reminder details
        G   General
        B   Baseline Frequency
        F   Findings
        FF   Function Findings
        L   Logic
        C   Custom date due
        D   Reminder Dialog
        W   Web Addresses

Select a section to edit; press ENTER when you are done editing.
To quit and exit type '^': Findings

Reminder Definition Findings

Choose from:

CF VA-PROGRESS NOTE   Finding # 1
Select FINDING: `1

Display help for CF.VA-PROGRESS NOTE? NO

Editing Finding Number: 1
FINDING ITEM: VA-PROGRESS NOTE//
REMINDER FREQUENCY:
MINIMUM AGE:
MAXIMUM AGE:
RANK FREQUENCY:
USE IN RESOLUTION LOGIC:
USE IN PATIENT COHORT LOGIC:
BEGINNING DATE/TIME:
ENDING DATE/TIME:
OCCURRENCE COUNT:
CONDITION:
CONDITION CASE SENSITIVE: NO//
USE STATUS/COND IN SEARCH:
COMPUTED FINDING PARAMETER: PLACEHOLDER TITLE// Enter local TIU title for the LIFE-SUSTAINING
TREATMENT note.

3. Map the local Advance Directive note title to the VAL-OBJ LAST ADV DIRECTIVE DATE

Begin in the Reminder Manager Menu in VistA

    CF   Reminder Computed Finding Management ...
    RM   Reminder Definition Management ...
    SM   Reminder Sponsor Management ...
    TXM   Reminder Taxonomy Management
    TRM   Reminder Term Management ...
    LM   Reminder Location List Management ...
    RX   Reminder Exchange
    RT   Reminder Test
    OS   Other Supporting Menus ...
    INFO Reminder Information Only Menu ...
    DM   Reminder Dialog Management ...
    CP   CPRS Reminder Configuration ...
    RP   Reminder Reports ...
    MST   Reminders MST Synchronization Management ...
    PL   Reminder Patient List Menu ...
    PAR   Reminder Parameters ...
    VS   NLM Value Set Menu
    ROC   Reminder Order Check Menu ...
    CQM   NLM Clinical Quality Measures Menu
    XM   Reminder Extract Menu ...

Select Reminder Managers Menu <TEST ACCOUNT> Option: **RM** Reminder Definition Management

    RL   List Reminder Definitions
    RI   Inquire about Reminder Definition
    RE   Add/Edit Reminder Definition
    RC   Copy Reminder Definition
    RA   Activate/Inactivate Reminders
    RH   Reminder Edit History
    ICS   Integrity Check Selected
    ICA   Integrity Check All
    PNE   Definition Print Name Edit
    PNR   Definition Print Name Report

Select Reminder Definition Management <TEST ACCOUNT> Option: **RE** Add/Edit Reminder Definition

Select Reminder Definition: **VAL-OBJ LAST ADV DIRECTIVE DATE**

  Select one of the following:

      A   All reminder details
      G   General
      B   Baseline Frequency
      F   Findings
      FF   Function Findings
      L   Logic
      C   Custom date due
      D   Reminder Dialog
      W   Web Addresses

Select a section to edit; press ENTER when you are done editing.
To quit and exit type '^': Findings

Reminder Definition Findings

Choose from:

CF VA-PROGRESS NOTE   Finding # 1
Select FINDING: **`1**

Display help for CF.VA-PROGRESS NOTE? **NO**

Editing Finding Number: 1
FINDING ITEM: VA-PROGRESS NOTE//
REMINDER FREQUENCY:
MINIMUM AGE:
MAXIMUM AGE:
RANK FREQUENCY:
USE IN RESOLUTION LOGIC:
USE IN PATIENT COHORT LOGIC:

BEGINNING DATE/TIME:
ENDING DATE/TIME:
OCCURRENCE COUNT:
CONDITION:
CONDITION CASE SENSITIVE: NO//
USE STATUS/COND IN SEARCH:
COMPUTED FINDING PARAMETER: PLACEHOLDER TITLE// **Enter local TIU title for the ADVANCE DIRECTIVE note.**

4. Map the VA-MH TOBACCO USE SCREENING (OUTPT) reminder definition to the VA-TOBACCO REMINDER RESULTS health summary type

Begin on the Health Summary Coordinator's Menu

1   Print Health Summary Menu ...
2   Build Health Summary Type Menu ...
3   Set-up Batch Print Locations
4   List Batch Health Summary Locations
5   CPRS Reports Tab 'Health Summary Types List' Menu ...

Select Health Summary Coordinator's Menu <TEST ACCOUNT> Option: **2** Build Health Summary Type Menu

1   Create/Modify Health Summary Type
2   Delete Health Summary Type
3   Health Summary Objects Menu ...
4   Information Menu ...
5   Print Health Summary Menu ...

Select Build Health Summary Type Menu <TEST ACCOUNT> Option: **1** Create/Modify Health Summary Type

Select Health Summary Type: **VA-TOBACCO REMINDER RESULTS**

WARNING: You are about to edit a Health Summary Type that is being used
by a Health Summary Object. Changing the structure of this Health Summary
Type will alter how the Object will display.

Do want to continue? NO// **YES**
NAME: VA-TOBACCO REMINDER RESULTS
TITLE: Tobacco Reminder//
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes//
SUPPRESS SENSITIVE PRINT DATA: NO SSN//
LOCK:
OWNER:

Do you wish to review the Summary Type structure before continuing? NO// **YES**

HEALTH SUMMARY TYPE INQUIRY

Type Name: VA-TOBACCO REMINDER RESULTS
   Title: Tobacco Reminder
   Owner:
SUPPRESS PRINT OF COMPONENTS WITHOUT DATA: yes
SUPPRESS SENSITIVE PRINT DATA: NO SSN

                       Max   Hos ICD Pro CPT
Abb Ord   Component Name   Occ Time Loc Text Nar Mod Selection
----
CF   5   Reminders Findings

        * = Disabled Components

Select COMPONENT: **CF** CLINICAL REMINDERS FINDINGS CF
CLINICAL REMINDERS FINDINGS is already a component of this summary.

   Select one of the following:

      E   Edit component parameters
      D   Delete component from summary

Select Action: **Edit component parameters**
SUMMARY ORDER: 5//
HEADER NAME: Reminders Findings//

No selection items chosen.

Select new items one at a time in the sequence you want them displayed.
You may select any number of items.

Select SELECTION ITEM: **VA-MH TOBACCO USE SCREENING (OUTPT)**

   Searching for a REMINDER DEFINITION, (pointed-to by SELECTION ITEM)

   Searching for a REMINDER DEFINITION
 VA-MH TOBACCO USE SCREENING (OUTPT)   NATIONAL
    ...OK? Yes// **Yes**

5. **Make the Dialogs able to be attached to a Personal/Shared template or to a progress note title.**

      A. **From the Reminders Manager Menu:**
      Select Reminder Managers Menu Option: **CP** CPRS Reminder Configuration
         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*

B.   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
Display Sequence: 150// <enter>
Clinical Reminder Dialog: VA-GEC CLC STANDARDIZED CONSULT NOTE
OK? Yes// <Enter>
```

6. **Setup of the CLC STANDARDIZED REFERRAL NOTE title.**

   A. Create the CLC STANDARDIZED REFERRAL NOTE note title.

 THIS IS NOT A CONSULT RESULT NOTE. Do not place this title in the CONSULTS document class.

   Title: CLC STANDARDIZED REFERRAL NOTE

VHA Enterprise Standard Title: <mark>GEC NOTE</mark>

7. <u>**Associate the reminder dialogs with the note titles in CPRS**</u>

    A. **Go to <mark>Template Editor</mark>, then <mark>Document Titles</mark>, select the appropriate folder (if applicable), and choose <mark>New Template</mark> (top right-hand corner).**
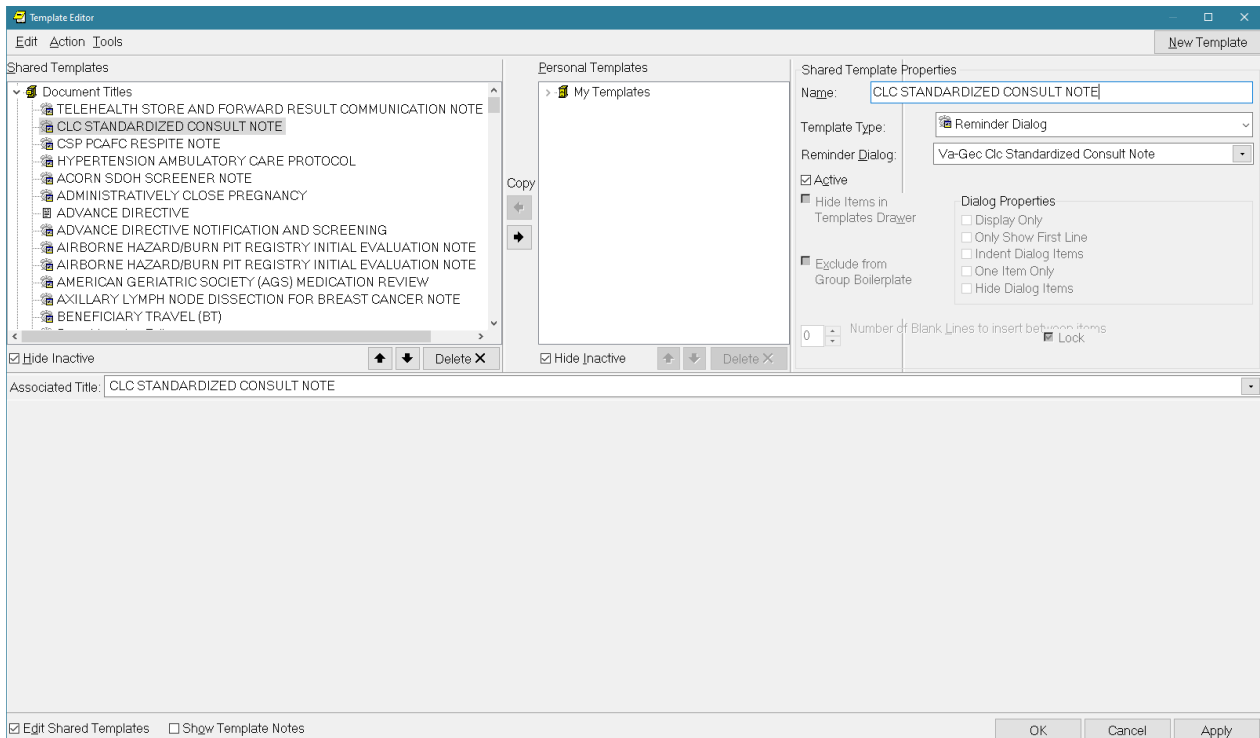
    Type in the following information:
    Name: <mark>**CLC STANDARDIZED REFERRAL NOTE**</mark>
    Template Type: <mark>Reminder Dialog</mark>
    Reminder Dialog: <mark>**VA-GEC CLC STANDARDIZED CONSULT NOTE**</mark>

    Next, type in the Associated Title, which in this case is <mark>**CLC STANDARDIZED REFERRAL NOTE**</mark> and SELECT Apply.

8. <u>**Review the local CLC admission consult order template (if available) with CLC leadership. Remove questions in the local consult order template that are also in the national CLC STANDARDIZED CONSULT NOTE dialog.**</u>

This is an important step, so staff aren't entering the same information twice when referring a patient to a CLC.

NOTE: 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: Affected Service
     Affected Service: VistA – CPRS: Clinical Reminders
     Assignment Group: NTL SUP Clin 2