Update _2_0_413

Clinical Reminders

VA-ONCOLOGY CLOSE TO ME TEMPLATES

Install Guide

February 2024

Product Development
Office of Information Technology
Department of Veterans Affairs

Table of Contents

Introduction

VA National Oncology Program (NOP) Close to Me infusion service provides parenteral anti-cancer therapy services at Community Based Outpatient Clinics (CBOCs) to increase access points to care for Veterans. This service seeks to reduce travel time for Veterans, improve VA care continuity, and provide Veteran-centric care. These templates (2 notes and 1 consult) were developed by the National Oncology Program Office in collaboration with an interdisciplinary team of subject matter experts. The consult template will be used by Oncology providers to place a consult order for service request. Two note templates will primarily be used by Close to Me nursing staff to triage consults and administer treatments to patients at the CBOCs. These standardized templates also include health factors to simplify data collection and facilitate continuous process improvement efforts.

For more information regarding the National Oncology Program:
REDACTED

The purpose of the Close to Me reminder dialogs are to standardize care, providing consistency in documentation and facilitating data collection. VHA Directive 1415 requires that all sites use the National Oncology templates therefore all sites must install the templates, however only sites currently participating in the Close to Me infusion program are required to implement them.

The reminder exchange file includes the following reminder dialog templates:
      1) VA-ONCOLOGY CLOSE TO ME CONSULT RESULT
      2) VA-ONCOLOGY CLOSE TO ME ADDENDUM

The package also includes the following TXML template:
      VA-ONC CLOSE TO ME CONSULT REQUEST

The Close to Me Consult Addendum template may be placed in your shared templates folder where your Oncology templates reside

Pre-Install
These are new templates so there are no pre-install steps.

UPDATE_2_0_413 contains 1 reminder exchange file entry named
UPDATE_2_0_413 VA-ONCOLOGY CLOSE TO ME TEMPLATES

The exchange file contains the following components:
HEALTH FACTORS
   1 VA-REMINDER UPDATES [C]
   2 VA-UPDATE_2_0_413
   3 VA-ONC CLOSE TO ME [C]

  4 VA-ONC C2ME TREATMENT REACTION
  5 VA-ONC C2ME EMERGENCY NOT RELATED TO TREATMENT
  6 VA-ONC C2ME MEDS WASTED/NOT USED
  7 VA-ONC C2ME ADDENDUM
  8 VA-ONCOLOGY CLOSE TO ME [C]
  9 VA-ONC C2ME PATIENT SUITABLE FOR CBOC TX NO
10 VA-ONC C2ME DEFER SCHEDULING
11 VA-ONC C2ME REFER PATIENT FOR SCHEDULING CBOC
12 VA-ONC C2ME REFER PATIENT FOR SCHEDULING NO
13 VA-ONC C2ME REVIEW NEXT STEPS/POC YES
14 VA-ONC C2ME REVIEW NEXT STEPS/POC NO
15 VA-ONC C2ME PATIENT CONSENT TX LOCATION NO
16 VA-ONC C2ME PATIENT CONSENT TX LOCATION YES
17 VA-ONC C2ME PATIENT SUITABLE FOR CBOC TX YES
18 VA-ONC C2ME SCHED/AVAIL ALIGN TO CBOC TX PLAN NO
19 VA-ONC C2ME SCHED/AVAIL ALIGN TO CBOC TX PLAN YES
20 VA-ONC C2ME RELIABLE TRANSPORT NO
21 VA-ONC C2ME RELIABLE TRANSPORT YES
22 VA-ONC C2ME TX VA LOC PATIENT PREFERENCE
23 VA-ONC C2ME TX PREF AT VA D/T C2ME SERVICES NA
24 VA-ONC C2ME TX PREF AT VA D/T C2ME SERVICES NO
25 VA-ONC C2ME TX PREF AT VA D/T C2ME SERVICES YES
26 VA-ONC C2ME TX LOC REVIEW NO
27 VA-ONC C2ME TX LOC REVIEW YES
28 VA-ONC C2ME PATIENT INTERVIEW
29 VA-ONC C2ME FIRST DOSE RECEIVED AT VAMC
30 VA-ONC C2ME FIRST DOSE OTHER/REASON
31 VA-ONC C2ME FIRST DOSE AT CBOC/CLINIC
32 VA-ONC C2ME MEETS NEED FOR FIRST DOSE AT VAMC
33 VA-ONC C2ME PATIENT RTN FROM COMM CARE NO
34 VA-ONC C2ME PATIENT RTN FROM COMM CARE YES
35 VA-ONC C2ME PATIENT ON APPROV C2ME TX
36 VA-ONC C2ME CHART REVIEW APPROP YES
37 VA-ONC C2ME CONSULT RESULT

REMINDER TERM
38 VA-REMINDER UPDATE_2_0_413

REMINDER DIALOG
39 VA-ONCOLOGY CLOSE TO ME ADDENDUM
40 VA-ONCOLOGY CLOSE TO ME CONSULT RESULT

Install Details

This update is being distributed as a web host file. The address for the host file is:
https://REDACTED /UPDATE_2_0_413.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; the post install will take less than 30 minutes.

Install Example

Go to Reminder exchange in Vista.
To Load the exchange file, use LWH. The URL is:
https://REDACTED/UPDATE_2_0_413.PRD

```
+              + 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// LWH   Load Web Host File
Input the URL for the .prd file:
https://_____/UPDATE_2_0_413.PRD
```

You should receive a message that the file was successfully loaded into your reminder exchange file.

```
https://_____/UPDATE_2_0_413.PRD successfully loaded.
```

Search and locate exchange file name UPDATE_2_0_413 VA-ONCOLOGY CLOSE TO ME TEMPLATES

```
+Item  Entry                          Source                   Date Packed
  589  UPDATE_2_0_413 VA-ONCOLOGY
       CLOSE TO ME TEMPLATES
  590  UPDATE_2_0_42 VA-TELERETINOPAT
       HY NOTES
  591  UPDATE_2_0_42 VA-TELERETINOPAT
       HY NOTES
  592  UPDATE_2_0_43 VA-SUICIDE RISK
       ASSESSMENT
  593  UPDATE_2_0_43 VA-SUICIDE RISK
       EVALUATION
+            + 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 (1-822): 589
```

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry
Enter the number that corresponds with your entry titled UPDATE_2_0_413 VA-ONCOLOGY CLOSE TO ME TEMPLATES
(in this example it is entry 589, it will vary by site) that is dated 02/01/2024.

```
Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-ONCOLOGY CLOSE TO ME ADDENDUM
  VA-ONCOLOGY CLOSE TO ME CONSULT RESULT

REMINDER TERM
  VA-REMINDER UPDATE_2_0_413

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.

For all new entries in any category, you will choose I to Install

You will then be prompted to install the FIRST dialog component.

```
Packed reminder dialog: VA-ONCOLOGY CLOSE TO ME CONSULT RESULT [NATIONAL DIALOG]

 Item  Seq. Dialog Findings                              Type      Exists
   1      VA-ONCOLOGY CLOSE TO ME CONSULT RESULT         dialog

   2    20 VA-GP ONC C2ME CONSULT MAIN                   group
             Finding: VA-ONC C2ME CONSULT RESULT (HEALTH FACTOR)           X
   3    20.20 VA-ONC C2ME CON INTENDED USERS             element
             Finding: *NONE*
   4    20.60 VA-GP ONC C2ME CON CHAR REV MAIN           group
             Finding: *NONE*
   5    20.60.20 VA-GP ONC C2ME CON CHAR REV TOLERATED TX    group
             Finding: *NONE*
   6    20.60.20.20 VA-ONC C2ME CON CHAR REV 1ST DOSE REQ   element
         AT VAMC
             Finding: VA-ONC C2ME MEETS NEED FOR FIRST DOSE AT VAMC        X
             (HEALTH FACTOR)
   7    PXRM COMMENT                                     prompt    X
+        + 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-ONCOLOGY CLOSE TO ME CONSULT RESULT**

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

```
VA-ONCOLOGY CLOSE TO ME CONSULT RESULT (reminder dialog) installed from exchange
 Item  Seq. Dialog Findings                                         Type      Exists
   1       VA-ONCOLOGY CLOSE TO ME CONSULT RESULT                   dialog      X

   2    20 VA-GP ONC C2ME CONSULT MAIN                              group       X
            Finding: VA-ONC C2ME CONSULT RESULT (HEALTH FACTOR)                 X
   3    20.20 VA-ONC C2ME CON INTENDED USERS                        element     X
            Finding: *NONE*
   4    20.60 VA-GP ONC C2ME CON CHAR REV MAIN                      group       X
            Finding: *NONE*
   5    20.60.20 VA-GP ONC C2ME CON CHAR REV TOLERATED TX           group       X
            Finding: *NONE*
   6    20.60.20.20 VA-ONC C2ME CON CHAR REV 1ST DOSE REQ           element     X
        AT VAMC
            Finding: VA-ONC C2ME MEETS NEED FOR FIRST DOSE AT VAMC             X
            (HEALTH FACTOR)
   7    PXRM COMMENT                                                prompt      X
+         + 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.

You will then be prompted to install the NEXT dialog component.

```
Packed reminder dialog: VA-ONCOLOGY CLOSE TO ME ADDENDUM [NATIONAL DIALOG]

Item  Seq. Dialog Findings                                    Type      Exists
   1     VA-ONCOLOGY CLOSE TO ME ADDENDUM                     dialog


   2  20 VA-GP ONC C2ME ADD MAIN                              group
         Finding: VA-ONC C2ME ADDENDUM (HEALTH FACTOR)                     X
   3  20.20 VA-ONC C2ME ADD INTENDED USER                    element
         Finding: *NONE*
   4  20.60 VA-GP ONC C2ME ADD SUBMAIN                        group
         Finding: *NONE*
   5  20.60.20 VA-ONC C2ME ADD MEDS WASTED                   element
         Finding: VA-ONC C2ME MEDS WASTED/NOT USED (HEALTH FACTOR)         X
   6  PXRM COMMENT                                            prompt      X
   7  20.60.40 VA-ONC C2ME ADD MEDICAL EMERGENCY             element
         Finding: VA-ONC C2ME EMERGENCY NOT RELATED TO TREATMENT           X
         (HEALTH FACTOR)
   8  PXRM COMMENT                                            prompt      X
+         + 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-ONCOLOGY CLOSE TO ME ADDENDUM**

Select Action: Next Screen// IA   Install All

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

```
VA-ONCOLOGY CLOSE TO ME ADDENDUM (reminder dialog) installed from exchange file.
 Item  Seq. Dialog Findings                                   Type     Exists
   1       VA-ONCOLOGY CLOSE TO ME ADDENDUM                    dialog     X

   2     20 VA-GP ONC C2ME ADD MAIN                            group      X
            Finding: VA-ONC C2ME ADDENDUM (HEALTH FACTOR)                 X
   3     20.20 VA-ONC C2ME ADD INTENDED USER                  element    X
            Finding: *NONE*
   4     20.60 VA-GP ONC C2ME ADD SUBMAIN                      group      X
            Finding: *NONE*
   5     20.60.20 VA-ONC C2ME ADD MEDS WASTED                 element    X
            Finding: VA-ONC C2ME MEDS WASTED/NOT USED (HEALTH FACTOR)     X
   6     PXRM COMMENT                                          prompt     X
   7     20.60.40 VA-ONC C2ME ADD MEDICAL EMERGENCY           element    X
            Finding: VA-ONC C2ME EMERGENCY NOT RELATED TO TREATMENT       X
            (HEALTH FACTOR)
   8     PXRM COMMENT                                          prompt     X
+        + 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-ONCOLOGY CLOSE TO ME ADDENDUM
  VA-ONCOLOGY CLOSE TO ME CONSULT RESULT


REMINDER TERM
  VA-REMINDER UPDATE_2_0_413


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:

Complete the following (not mandatory to complete if you are not a current or future Close to Me site):

Step 1: Complete the Oncology Close to Me Consult Setup Technical Guide (separate attachment).

Step 2: Complete Update_2_0_413 post installation steps below.

National Oncology Close to Me Consult Result Note

1. **Create Note Titles:**
    Document Definitions (Manager) → Create Document Definitions → Next Level → Progress Notes → Next Level → Enter document class where consults are located → Title.

    Create the following note title:
    ONCOLOGY CLOSE TO ME CONSULT RESULT (may leave out "RESULT" if that is not your sites naming convention)

    VHA Enterprise Standard Title: <mark>**HEMATOLOGY AND ONCOLOGY CONSULT**</mark>
    You can add these to your document class where consults are located.

    NOTE: You will add this note to your consult document class.

2. **Make the Dialog template available to be attached to a Personal or Shared template and attach the dialog to a progress note title (LINK feature in this menu for steps 2 and 3).**

    Select Reminder Managers Menu Option: <mark>CP</mark> 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
    - DEVL Evaluate Coversheet List on Dialog Finish
    - DL   Default Outside Location
    - PT   Position Reminder Text at Cursor
    - LINK   Link Reminder Dialog to Template
    - TEST CPRS Coversheet Time Test
    - NP   New Reminder Parameters
    - GEC   GEC Status Check Active
    - WH   WH Print Now Active

    Select CPRS Reminder Configuration Option: <mark>TIU</mark> 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 [SALT LAKE CITY]
    - 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: NATREM.FO-SLC.MED.VA.GOV
Select Display Sequence:
388   VA-COVID-19 TELEPHONE FOLLOW-UP
389   VA-SRA-CONSULT RESPONSE (D)
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, 391 is not present so I will use 391.

Select Display Sequence: **391**
Are you adding 391 as a new Display Sequence? Yes// **YES**
Display Sequence: 391// <Enter>   391
Clinical Reminder Dialog: **VA-ONCOLOGY CLOSE TO ME CONSULT RESULT**
reminder dialog   NATIONAL
        ...OK? Yes// <Enter> (Yes)

Select Display Sequence: **392**
Are you adding 392 as a new Display Sequence? Yes// **YES**
Display Sequence: 392// <Enter>   392
Clinical Reminder Dialog: **VA-ONCOLOGY CLOSE TO ME ADDENDUM**
reminder dialog   NATIONAL
        ...OK? Yes// <Enter> (Yes)

3. **Associate the reminder dialogs with the note title in CPRS.**
   In CPRS, open the Template Editor, expand Document Titles, select the appropriate folder (if applicable), then click New Template (top right-hand corner).
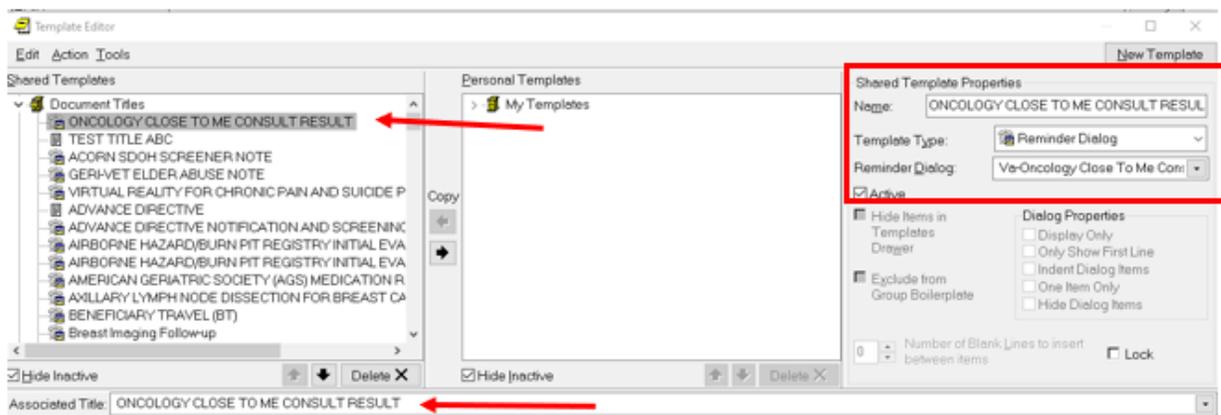
   a. Type in the following information:
      Name: **ONCOLOGY CLOSE TO ME CONSULT RESULT**
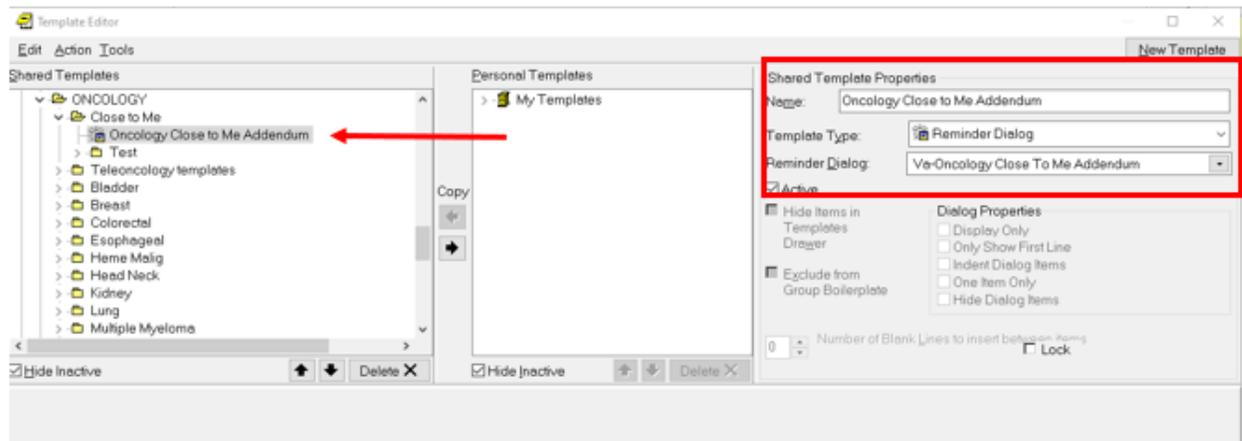   Template Type: **Reminder Dialog**
      Reminder Dialog: **VA-ONCOLOGY CLOSE TO ME CONSULT RESULT**

Next, type in the Associated Title name:
ONCOLOGY CLOSE TO ME CONSULT RESULT - then click Apply.

4. **Place the Close to Me Addendum reminder dialog into the shared templates folder where you normally place oncology templates**
In Template Editor, expand Shared Templates, select the appropriate folder (if applicable), then click New Template (top right-hand corner).

b. Type in the following information:
Name: **Oncology Close to Me Addendum** **(can be in all caps or mixed case per site preference)**
Template Type: **Reminder Dialog**
Reminder Dialog: **VA-ONCOLOGY CLOSE TO ME ADDENDUM**

then click Apply.

5. **Add Social Work Consult to the reminder dialog.**
Using the VistA menu Reminder Dialog Management (DM) → Reminder Dialogs (DI) → Change View (CV) → Dialog Elements (E) view.

Locate and edit the reminder dialog element:
VA-ONC C2ME CON PTI MODE OF TRANSPORT NO

Map your site's social work consult quick order as the FINDING ITEM

6. If your site does not wish to have the RTC order populate from the template, edit this element and remove the additional finding.

NAME: VA-ONC C2ME CON PTI TX SCHEDULE AT CBOC
FINDING ITEM: VA-ONC C2ME REFER PATIENT FOR SCHEDULING CBOC
Additional findings:
Q   SD RTC   Finding #   1

Select ADDITIONAL FINDING: `1 SD RTC

Editing Finding Number: 1
ADDITIONAL FINDINGS: SD RTC// @
SURE YOU WANT TO DELETE THE ENTIRE ADDITIONAL FINDINGS? y (Yes)
DIALOG/PROGRESS NOTE TEXT: