

Update_2_0_427

Clinical Reminders

VA-SURVIVORS ASSISTANCE AND MEMORIAL SUPPORT TEMPLATES

Install Guide

June 2024

Product Development Office of Information Technology Department of Veterans Affairs

| TABLE OF CONTENTS | |
|-------------------|---|
| INTRODUCTION | |
| INSTALL DETAILS | |
| INSTALL EXAMPLE | 4 |
| POST INSTALLATION | |

Introduction

VHA is establishing a Survivors Assistance and Memorial Support (SAMS) Program to provide personalized, supportive services to families, caregivers, and survivors at the end of a Veteran's life and ensure Veterans without identified family receive dignified burials to honor their service. After a Veteran dies while receiving VA care (in a VA facility or while on VA authorized care at a non-VA facility) the decedent affairs clerk contacts the legal next-of-kin within 24 hours to facilitate administrative tasks.

These tasks include:

- Selecting a funeral home.
- Requesting an autopsy.
- Obtaining a copy of the death certificate and adding it to the Veteran's electronic health record.
- Acquiring additional benefits information to be documented in the Veteran's electronic health record.

Staff will use the Survivors Assistance and Memorial Support (SAMS) Program templates to document these interactions. The SAMS templates' function is to standardize and improve the documentation of these interactions.

The measures of success for these three templates are:

- Their adoption across all VA facilities.
- The monitoring quality of data gathered when VA staff:
 - Offer standardized bereavement materials to survivors.
 - Use the required process to determine that a Veteran's remains are unclaimed, and then processing (and documenting) the required steps for handling unclaimed remains.

UPDATE_2_0_427 contains 1 Reminder Exchange entry: UPDATE_2_0_427 VA-SURVIVORS ASSISTANCE AND MEMORIAL SUPPORT

The exchange file contains the following components:

TIU TEMPLATE FIELDS

VA-WORD VA-BLANK SP VA-SAMS LOCATION VA-DATE ONLY VA-OTHER TEXT VA-* VA-BLANK IN PN TEXT VA-BLANK IN PN TEXT VA-DATE TIME VA-EDIT 20/240

HEALTH FACTORS

VA-REMINDER UPDATES [C] VA-UPDATE 2 0 427 VA-SURVIVOR ASSISTANCE AND MEMORIAL SUPPORT (SAMS) [C] VA-SAMS CHAPLAIN REQUESTED VA-SAMS FU CONTACT VA-SAMS INITIAL CONTACT VA-SAMS CONTACT VA-SAMS CONTACT THIRD ATTEMPT VA-SAMS CONTACT SECOND ATTEMPT VA-SAMS CONTACT FIRST ATTEMPT VA-SAMS ROLE OTHER VA-SAMS ROLE FRIEND VA-SAMS ROLE FAMILY VA-SAMS ROLE NOK VA-SAMS MODALITY TELEHEALTH VA-SAMS MODALITY TELEPHONE VA-SAMS MODALITY IN PERSON VA-SAMS CONTACT SAMS SPECIALIST VA-SAMS CONTACT CLINICAL VA-SAMS DEATH CERT RECEIVED VA-SAMS DEATH HUMANITARIAN VA-SAMS DEATH EXTERNAL VA-SAMS DEATH AUTHORIZED CARE VA-SAMS DEATH INPATIENT VA-SAMS DEATH VA ED VA-SAMS DEATH CERT TEMPLATE VA-SAMS ORGAN DONATION NOT ON FILE VA-SAMS ORGAN DONATION ON FILE VA-SAMS DEATH CERT REQUESTED VA-SAMS CITC MANAGER AWARE VA-SAMS UNCLAIMED RELEASED VA-SAMS NOK VERBAL CONSENT VA-SAMS UNCLAIMED UNRELEASED VA-SAMS FORM 27-2008 VA-SAMS BURIAL FLAG VA-SAMS UNCLAIMED NATIONAL CEMETERY VA-SAMS FUNERAL PENDING VA-SAMS MILITARY DC HONORS NO VA-SAMS MILITARY DC UNAVAILABLE VA-SAMS MILITARY DC NOK VA-SAMS MILITARY DC FUNERAL HOME VA-SAMS FUNERAL HOME NOTIFICATION VA-SAMS DISPOSITION GREEN VA-SAMS DISPOSITION SEA VA-SAMS DISPOSITION CREMATION VA-SAMS DISPOSITION BURIAL VA-SAMS 523 COMPLETED VA-SAMS AUTOPSY REQUESTED VA-SAMS DEATH/DISCHARGE NOTE RECEIVED VA-SAMS CORONOR CASE VA-SAMS NVA CONTACT

VA-SAMS COD NOT OBTAINED VA-SAMS COD UNKNOWN VA-SAMS COD OTHER VA-SAMS COD HOMICIDE VA-SAMS COD SUICIDE VA-SAMS COD ACCIDENTAL VA-SAMS COD NATURAL VA-SAMS REMAINS UNCLAIMED VA-SAMS REMAINS CLAIMED VA-SAMS CONTACT CERTIFIED LETTER

REMINDER SPONSORS

OFFICE OF SOCIAL WORK

REMINDER TERMS

VA-REMINDER UPDATE_2_0_427 VA-SAMS EXTERNAL VA-SAMS VA AUTHORIZED CARE VA-SAMS CITC VA-SAMS FUNERAL HOME VA-SAMS INPATIENT VA-SAMS COD VA-SAMS REMAINS UNCLAIMED

HEALTH SUMMARY COMPONENTS PCE HEALTH FACTORS SELECTED

HEALTH SUMMARY TYPES VA-SAMS CONTACT

HEALTH SUMMARY OBJECTS VA-SAMS CONTACT (TIU)

TIU DOCUMENT DEFINITONS

PATIENT DATE OF DEATH VA-SAMS CONTACT

REMINDER DIALOGS

VA-SAMS SURVIVOR CONTACT CLINICAL VA-SAMS DEATH CERTIFICATE VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST

Install Details

This update is being distributed as a web host file. The address for the host file is: https://REDACTED/UPDATE_2_0_427.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 30 minutes.

Install Example

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

| + | + | Next | Screen | - Prev | Screen | ?? | More | Actions | >>> |
|-------|----------|--------|----------|---------|--------|-------|--------|---------------------|---------------------|
| CFE | Create | Excha | nge File | Entry | | LHF | Load | Host File | |
| CHF | Create | Host | File | | | LMM | Load | MailMan Message | |
| CMM | Create | MailM | an Messa | ge | | LR | List | Reminder Definiti | ions |
| DFE | Delete | Excha | nge File | Entry | | LWH | Load | Web Host File | |
| IFE | Instal | L Exch | ange Fil | e Entry | | RI | Remi | nder Definition In | nquiry |
| IH | Install | lation | History | | | RP | Repa | ck | |
| Seled | ct Actio | on: Ne | xt Scree | n// LWH | Load | Web I | Host I | ile < | |
| Input | t the U | RL for | the .pr | d file: | https: | | | | /UPDATE_2_0_427.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: https://REDACTED/UPDATE_2_0_247.PRD You should see a message at the top of your screen that the file successfully loaded.

https://_____/UPDATE_2_0_427.PRD successfully loaded.

Search reminder exchange and locate an entry titled: UPDATE 2 0 427 VA-SURVIVORS ASSISTANCE AND MEMORIAL SUPPORT

| +Item | Entry | Sourc | е | Date Packed |
|-----------|----------------------------------|--------|-------------------|------------------|
| 553 | UPDATE_2_0_427 VA-SURVIVORS | | | 05/14/2024@07:31 |
| | ASSISTANCE AND MEMORIAL | | 5 | 222 225 |
| | SUPPORT | | | |
| 554 | UPDATE_2_0_428 VA-TERATOGENIC | | | 03/07/2024@06:22 |
| | MEDS ORDER CHECKS UPDATE | | | |
| outraine. | 2024-01 | | | |
| 555 | UPDATE_2_0_43 VA-SUICIDE RISK | | | 08/08/2018@10:04 |
| 111110 | ASSESSMENT | | | |
| 556 | UPDATE_2_0_430 VA-MISC UPDATE | | | 02/28/2024@11:19 |
| | 27 | | | |
| + | + Next Screen - Prev Scree | n ?? | More Actions | >>> |
| CFE C | reate Exchange File Entry | LHF | Load Host File | |
| CHF C | reate Host File | LMM | Load MailMan Mes | ssage |
| CMM C | Create MailMan Message | LR | List Reminder De | efinitions |
| DFE D | Delete Exchange File Entry | LWH | Load Web Host F: | ile |
| IFE I | install Exchange File Entry | RI | Reminder Definit | tion Inquiry |
| IH I | Installation History | RP | Repack | |
| Select | : Action: Next Screen// IFE Ins | tall E | xchange File Enti | ry |
| Enter | a list or range of numbers (1-75 | 2): 55 | 3 | |

At the <u>Select Action</u> prompt, enter <u>IFE</u> for Install Exchange File Entry Enter the number that corresponds with your entry:

UPDATE_2_0_427 VA-SURVIVORS ASSISTANCE AND MEMORIAL SUPPORT (In this example it is entry 553. It will vary by site). The date of the exchange file should be 05/14/2024@07:31.

| Component | | | Category | Exists |
|---|-----|--------------|------------------|--------|
| Source: | | | | |
| Date Packed: 05/14/2024@07:31:01 | | | | |
| Package Version: 2.0P65 | | | | |
| Description: | | | | |
| The following Clinical Reminder items w | ere | selected for | packing: | |
| REMINDER DIALOG | | | | |
| VA-SAMS SURVIVOR CONTACT SAMS SPECIAL | IST | | | |
| VA-SAMS DEATH CERTIFICATE | | | | |
| VA-SAMS SURVIVOR CONTACT CLINICAL | | | | |
| | | | | |
| | | | | |
| Non exchangeable TIL object(c): | | | | |
| Non-exchangeable 110 object(s). | | | | |
| TIU Object: PATIENT DATE OF DEATH | | | | |
| + Enter ?? for more actions | | | | >>> |
| IA Install all Components | IS | Install Se | lected Component | |
| Select Action: Next Screen// IA | | | | |

At the <u>Select Action</u> prompt, type <u>IA</u> for Install all Components and hit enter. Select Action: Next Screen// <u>IA</u> Install all Components

You will see several prompts:

For all new entries you will choose I to Install

For entries that already exist but the packed component is different, choose O to Overwrite

You will be promped to install the 1st reminder dialog component (VA-SAMS SURVIVOR CONTACT CLINICAL)

You will install all even though some components may have an X to indicate that they exist.

| F | acked | d reminder | ˈdialog:ˈ | /A-SAM | S SURVIVOR (| CONTACT C | LINICA | L [NATIO | NAL DIALC |)G] |
|--|--------|---------------------|-------------|--------------|--------------|-----------|--------|----------|-----------|--------|
| | Item | Seq. Dia | alog Findi | ngs | | | | | Туре | Exists |
| | 1 | VA-SAMS | S SURVIVOR | CONTA | CT CLINICAL | | | (| dialog | |
| | 2 | 5 VA-SAM VERSION | IS SURVIVO | R CONT | ACT CLINICAL | NOTE TE | MPLATE | e. | Lement | |
| | | Fir | nding: VA- | SAMS C | ONTACT CLIN | ICAL (HEA | LTH FA | CTOR) | | Х |
| | 3 | 10 VA-GF Fir | P SAMS SUR | /IVOR NF* | CONTACT CLIM | NICAL MAI | N | | group | |
| | 4 | 10.10 VA | A-SAMS PRE | /IOUS | CONTACT | | | e | Lement | Х |
| | | Fir | nding: *NO | VE* | | | | | | |
| | 5 | 10.15 VA | A-GP SAMS I | MODALI | ΤY | | | | group | Х |
| Finding: *NONE* 6 10.20 VA-GP SAMS SURVIVOR ROLE group Finding: *NONE* | | | | | | | | Х | | |
| | 7 | 10.25 VA | A-GP SAMS | CONTAC | T CLINICAL | | | | group | |
| ł | - | + Nex | t Screen | - Pr | ev Screen | ?? More | Action | S | | |
| 0 |)D [| Dialog Det | ails | DT | Dialog Text | t | IS | Install | Selected | |
| |)F [| Dialog Fir | ndings | DU | Dialog Usa | ge | QU | Quit | | |
| | DS [| Dialog Sun | imary | IA | Install All | | | | | |
| 5 | select | ACTION: | Next Scre | en// I | A | | | | | |

At the <u>Select Action</u> prompt, type <u>IA</u> to install the dialog: VA-SAMS SURVIVOR CONTACT CLINICAL

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

| Pack | ed reminder dialog: VA-SAMS SURVIVOR CONTACT CLINICAL [NA | TIONAL DIALO | G] |
|------|---|------------------|---------|
| VA-S | AMS SURVIVOR CONTACT CLINICAL (reminder dialog) installed | from exchan | ge file |
| Ite | m Seq. Dialog Findings | Туре | Exists |
| 1 | VA-SAMS SURVIVOR CONTACT CLINICAL | dialog | Х |
| | | | |
| 2 | 5 VA-SAMS SURVIVOR CONTACT CLINICAL NOTE TEMPLATE | element | Х |
| | VERSION | | |
| | Finding: VA-SAMS CONTACT CLINICAL (HEALTH FACTOR) | | Х |
| | | | |
| 3 | 10 VA-GP SAMS SURVIVOR CONTACT CLINICAL MAIN | aroup | Х |
| Ŭ | Finding: *NONE* | 9. o «p | |
| Λ | 10 10 VA-SAMS PREVIOUS CONTACT | alamant | Y |
| - | Finding: *NONE* | erement | ~ |
| 5 | | apolup | v |
| J | Finding, tNONEt | group | ^ |
| 0 | | A D O U D | v |
| b | 10.20 VA-GP SAMS SURVIVUR RULE | group | X |
| - | Finding: *NUNE* | | 152 |
| / | 10.25 VA-GP SAMS CONTACT CLINICAL | group | Х |
| + | + Next Screen - Prev Screen ?? More Actions | | |
| DD | Dialog Details DT Dialog Text IS Insta | all Selected | |
| DF | Dialog Findings DU Dialog Usage QU Quit | | |
| DS | Dialog Summary IA Install All | | |
| Sele | ct Action: Next Screen// <mark>Q</mark> | | |
| - | | | |

After completing this dialog install, you will type **Q**.

You will be promped to install the 2nd reminder dialog component (VA-SAMS DEATH CERTIFICATE)

You will install all even though some components may have an X to indicate that they exist.

| Packed | reminder dialog: VA-SAMS DEATH CERTIFICATE [NATIONAL D | IALOG] | |
|--------|--|-------------|--------|
| Item | Seg. Dialog Findings | Туре | Exists |
| 1 | VA-SAMS DEATH CERTIFICATE | dialog | |
| 2 | 5 VA-SAMS DEATH CERTIFICATE VERSION | element | |
| | Finding: VA-SAMS DEATH CERT TEMPLATE (HEALTH FACT | OR) | Х |
| 0 | | apoup | |
| 3 | Finding: *NONE* | group | |
| 4 | 10.10 VA-GP SAMS DEATH OCCURRED | group | |
| 5 | Finding: *NONE* | alomont | |
| 0 | Finding: VA-SAMS DEATH VA ED (HEALTH FACTOR) | erement | Х |
| 6 | 10.10.10 VA-SAMS DEATH INPATIENT | element | |
| 7 | Finding: VA-SAMS DEATH INPALIENT (HEALTH FACTOR) | element | Х |
| | Finding: VA-SAMS DEATH AUTHORIZED CARE (HEALTH FA | CTOR) | Х |
| + | + Next Screen - Prev Screen ?? More Actions | | |
| DD D. | ialog Details DT Dialog Text IS Inst | all Selecte | d |
| DF D | lalog Findings DU Dialog Usage QU Quit | | |
| Select | Action: Next Screen// IA | | |

At the <u>Select Action</u> prompt, type <u>IA</u> to install the dialog: VA-SAMS DEATH CERTIFICATE

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

| Packed reminder dialog: VA-SAMS DEATH CERTIFICATE [NATIONAL DIALOG] | | | | | | | | | | |
|---|---|--------|--|--|--|--|--|--|--|--|
| VA-SAMS DEATH CERTIFICATE (reminder dialog) installed from exchange file. | | | | | | | | | | |
| Item Seq. Dialog Findings | Type | Exists | | | | | | | | |
| 1 VA-SAMS DEATH CERTIFICATE | noleih | X | | | | | | | | |
| | didiog | ~ | | | | | | | | |
| | and the second se | V | | | | | | | | |
| 2 5 VA-SAMS DEATH CERTIFICATE VERSION | erement | X | | | | | | | | |
| Finding: VA-SAMS DEATH CERT TEMPLATE (HEALTH FAC | TOR) | Х | | | | | | | | |
| | | | | | | | | | | |
| 3 10 VA-GP SAMS DEATH CERTIFICATE MAIN | aroup | X | | | | | | | | |
| Finding: *NONE* | group | ~ | | | | | | | | |
| FINUING, "NONE" | | | | | | | | | | |
| 4 10.10 VA-GP SAMS DEATH OCCURRED | group | Х | | | | | | | | |
| Finding: *NONE* | | | | | | | | | | |
| 5 10.10.5 VA-SAMS DEATH VHA ED | element | Х | | | | | | | | |
| Finding: VA-SAMS DEATH VA ED (HEALTH EACTOR) | | Y | | | | | | | | |
| A 10 10 VA CAMO DEATH INDATIENT | alamant | v | | | | | | | | |
| 0 IU.IU.IU VA-SAMO DEATH INFALLENT | етешенг | ٨ | | | | | | | | |
| Finding: VA-SAMS DEATH INPATIENT (HEALTH FACTOR) | | Х | | | | | | | | |
| 7 10.10.15 VA-SAMS DEATH VHA AUTHORIZED CARE | element | Х | | | | | | | | |
| Finding: VA-SAMS DEATH AUTHORIZED CARE (HEALTH F | ACTOR) | Х | | | | | | | | |
| + + Next Screen - Prev Screen 22 More Actions | | | | | | | | | | |
| DD Dialog Detailo DT Dialog Toxt IC Inc | | d | | | | | | | | |
| DD Dialog Details DT Dialog Text 15 lifs | LAII Selecte | iu - | | | | | | | | |
| DF Dialog Findings DU Dialog Usage QU Qui | Ū. | | | | | | | | | |
| DS Dialog Summary IA Install All | | | | | | | | | | |
| Select Action: Next Screen// Q | | | | | | | | | | |
| en e | | | | | | | | | | |

After completing this dialog install, you will type Q. You will be promped to install the 3rd reminder dialog component (VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST)

You will install all even though some components may have an X to indicate that they exist.

| Ра | icked | remi | nder | dial | og: \ | /A-SAI | MS SURV | IVOR | CONTAC | T SAMS | S SPE | ECIALI | ST | [NATION | AL | DIALC |
|----|-------|-------|--------------|--------|--------------|--------------|---------|--------|---------|---------|-------|---------|----------|---------|----|-------|
| I | tem | Seq. | Dia | Log F: | indir | ngs | | | | | | | | Туре | E> | ists |
| | 1 | VA-S | SAMS | SURV: | IVOR | CONT | ACT SAM | IS SP | ECIALIS | Т | | | C | lialog | | |
| | 2 | 5 VA | - SUR\ | /IVOR | CONT | FACT - S | SAMS SF | VER | SION | | | | el | lement | | |
| | | | Find | ding: | VA-S | SAMS (| CONTACT | SAM | S SPECI | ALIST | (HEA | ALTH F | ACT | TOR) | | Х |
| | 3 | 10 V/ | A-GP Find | SAMS | SUR\ *NOM | /IVOR JF* | CONTAC | T SP | ECIALIS | T MAIN | ļ | | | group | | |
| | 4 | 10.1 | 0 VA | SAMS | PRE | /IOUS | CONTAC | T | | | | | el | lement | | |
| | | | Find | ding: | *NON | NE* | | | | | | | | | | |
| | 5 | 10.1 | 5 VA | -GP S/ | AMS N | 10DAL | ITY | | | | | | | group | | |
| | e | 10 11 | F1N(| ding: | *NON | | | EDOO | M | | | | 01 | omont | | |
| | 0 | 10.1 | Find | dina. | | SAMS I | | Y TN | PERSON | (HEAI | TH F | ACTOR | 5) 51 | rement | | x |
| | 7 | VA-S | AMS | IN PER | RSON | LOCA | TION | 1 - 10 | TENCON | (116746 | | //01011 | ', c | prompt | | ~ |
| | 8 | 10.1 | 5.10 | VA-S/ | AMS N | 10DAL | ITY PHC | NE | | | | | el | Lement | | |
| + | | + | Next | t Scre | een | - P | rev Scr | een | ?? Mo | re Act | ions | 6 | | | | |
| DD |) D | ialog | Deta | ails | | DT | Dialc | g Te | xt |] | S | Insta | 11 | Selecte | d | |
| DF | D | ialog | Find | dings | | DU | Dialc | g Us | age | (| NN N | Quit | | | | |
| DS | D | ialog | Sum | nary | | IA | Insta | II A | 11 | | | | | | | |
| Se | lect | Acti | on: I | vext s | scree | en// | IA | | | | | | | | | |

At the <u>Select Action</u> prompt, type <u>IA</u> to install the dialog: VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST

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

| Packed reminder dialog: VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST | [NATIONAL DIALC |
|--|------------------|
| VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST (reminder dialog) instal | lled from exchan |
| Item Seq. Dialog Findings | Type Exists |
| 1 VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST | ialog X |
| | |
| 2 5 VA-SURVIVOR CONTACT-SAMS SP VERSION el | lement X |
| Finding: VA-SAMS CONTACT SAMS SPECIALIST (HEALTH FACT | OR) X |
| a service of the second s | |
| 3 10 VA-GP SAMS SURVIVOR CONTACT SPECIALIST MAIN | aroup X |
| Finding: *NONE* | 91900 |
| 4 10 10 VA-SAMS PREVIOUS CONTACT | ement X |
| Finding: *NONE* | |
| 5 10 15 VA_GP SAMS MODALITY | aroun Y |
| Finding: *NONE* | group A |
| A 10 15 5 VA SAME MODALITY IN DEDSON | omont V |
| 0 IV.IJ.J VA-SANG MODALITT IN FENSION (HEALTH EACTOD) | |
| FINDING: VA-SAMS MUDALITY IN PERSON (HEALIN FACTOR) | Å |
| 7 VA-SAMS IN PERSON LOCATION | prompt X |
| 8 10.15.10 VA-SAMS MODALITY PHONE el | lement 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.

| Compone | ent | | | Category | Exists |
|---------------|---------------------------------|--------|---------|--------------------|--------|
| Source: | | | | | |
| Date Packed: | 05/14/2024@07:31:01 | | | | |
| Package Vers. | ion: 2.0P65 | | | | |
| | | | | | |
| Description: | | | | | |
| The following | g Clinical Reminder items | were s | elected | for packing: | |
| REMINDER DIA | _0G | | | | |
| VA-SAMS SU | VIVOR CONTACT SAMS SPECIA | ALIST | | | |
| VA-SAMS DE | ATH CERTIFICATE | | | | |
| VA-SAMS SU | RVIVOR CONTACT CLINICAL | | | | |
| | | | | | |
| REMINDER TER | 1 | | | | |
| VA-REMINDER | R UPDATE_2_0_427 | | | | |
| Non-exchange | able TIU object(s): | | | | |
| | | | | | |
| TIU Object: | PATIENT DATE OF DEATH | | | | |
| + + | Next Screen - Prev Scre | en ?? | More Ac | tions | >>> |
| IA Install | all Components | IS | Install | Selected Component | |
| Select Action | n: Next Screen// <mark>Q</mark> | | | | |

You will then be returned to this screen. At the <u>Select Action</u> prompt, type <u>Q</u>.

Install complete.

Post Installation

1. Make the dialogs available to be attached to Personal or Shared templates and/or to be able to attach to progress note titles.

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** 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: VA-SAMS DEATH CERTIFICATE then <enter> reminder dialog NATIONAL OK? Yes// <Enter> (Yes)

Select Display Sequence: 151 Are you adding 151 as a new Display Sequence? Yes// Y YES Display Sequence: 151// <Enter> 151 Clinical Reminder Dialog: VA-SAMS SURVIVOR CONTACT CLINICAL then <enter> reminder dialog NATIONAL OK? Yes// <Enter> (Yes)

Select Display Sequence: 152 Are you adding 153 as a new Display Sequence? Yes// Y YES Display Sequence: 153// <Enter> 152 Clinical Reminder Dialog: VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST then <enter> reminder dialog NATIONAL OK? Yes// <Enter> (Yes)

2. Setup of specific Note titles.

You will need to create three new note titles for these templates, as follows:

SAMS DEATH CERTIFICATE SAMS SURVIVOR CONTACT CLINICAL SAMS SURVIVOR CONTACT SAMS SPECIALIST

All the note titles above are to be mapped to the following VHA Enterprise Standard Title: **SOCIAL WORK NOTE**

Note: Comprehensive information on Creating Document Definitions can be found beginning on page 47 of the <u>TIU/ASU Implementation Guide</u>

3. Associate the new reminder dialogs with the note titles in CPRS

To do this, go to Template Editor, then Document Titles, select the appropriate folder (if applicable), and choose New Template (top right-hand corner).

a. Type in the following information: Name: SAMS DEATH CERTIFICATE Template Type: Reminder Dialog Reminder Dialog: VA-SAMS DEATH CERTIFICATE

Next, type in the Associated Title, which in this case is **SAMS DEATH CERTIFICATE** and click Apply.

| 🔁 Template Editor | | × |
|---|-------------------------|--|
| Edit Action Icols | | New Template |
| Shared Templates Document Titles SAMS DEATH CERTIFICATE ADMINISTRATIVELY CLOSE PREGNANCY ADVANCE DIRECTIVE ADVANCE DIRECTIVE NOTIFICATION AND SCREENING ANDROINE HAZARD/BURN PT REGISTRY INITIAL EVALUATION NOTE AIRBORNE HAZARD/BURN PT REGISTRY INITIAL EVALUATION NOTE | Personal Templates | Shared Template Properties Nagre: SAMS DEATH CERTIFICATE Template Type: Reminder Dialog Particular Dialog: Va Sam: Death Certificate Agtive Hide Items in Templates Dialog Properties Dialog Pr |
| AMERICAN DERIGINIC SUCCESS AND ADDRESS CONCERNOTE ADDRESS CONCERNOTE BEAAVORAL THERAPY Breast Imaging Follow-up Bres COGNITIVE BEHAAVORAL THERAPY Bres VF0-20 VISUAL FUNCTIONING QUESTIONNAIRE | Tidelpartue 🔿 🖉 Datas 🗶 | Crop Show Field Line Crop Show Field Line Crop Show Field Line Crop Bolleplate Ore Item Only Hide Dialog Items Ore Number of Blank Lines to inset Lock |
| Associated Title: SAMS DEATH CERTIFICATE | | • |
| | | |
| Egit Shared Templates Show Template Notes | | OK Cancel Apply |

b. Name: SAMS SURVIVOR CONTACT CLINICAL

Template Type: Reminder Dialog Reminder Dialog: VA-SAMS SURVIVOR CONTACT CLINICAL Associated Title: SAMS SURVIVOR CONTACT CLINICAL

| n Template Editor | | - 🗆 X | | |
|---|---|--|--|--|
| Edit Action Icols | | New Template | | |
| Shared Templates Conserved Titles Shared Templates Document Titles Shares Dearth CERTIFICATE ADVANCE DIRECTIVE ADVANCE ADVA | Eersonal Templates > : fill My Templates Copy Image: Copy | Shared Template Properties Negre: SAMS SURVIVOR CONTACT CLINICAL Template Type: Perioder Dialog Reminder Dialog: Va-Sams Survivor Contact Clinical Agtive Hide Rems in Dialog Properties Diager Egolude from Goog Bolepilate Che Item Dialog Che Item Che Item Che Item Dialog Che Item Ch | | |
| BRILEFICURARY TRAVEL (BT) Briest Imaging Follow up Briest COGNITIVE BEHAVIDRAL THERAPY V Hide Inactive Associated Title: SAMS SURVIVOR CONTACT CUNICAL | 🕅 Hide Inactive 🔹 🔹 Indexa X | Number of Blank Lines to insett D | | |
| | | | | |
| Egk Shared Templates Show Template Notes | | OK. Cancel Apply | | |

c. Name: SAMS SURVIVOR CONTACT SAMS SPECIALIST

Template Type: Reminder Dialog Reminder Dialog: VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST Associated Title: SAMS SURVIVOR CONTACT SAMS SPECIALIST

| 🔁 Template Editor | | | | L X |
|---|--------------------|--|---|--------------|
| Edit Action Iools | | | | New Template |
| Shared Templates | Personal Templates | Shared Template Propert | ties | |
| Courient Titles | > - 🖪 My Templates | Name SAMS SUR | WVOR CONTACT SAMS SPECIA | ALIST |
| - SAMS DEATH CERTIFICATE | | Template Type: | 🐞 Reminder Dialog | ~ |
| SAMS SURVIVOR CONTACT SAMS SPECIALIST | | Reminder Dialog: | Va-Sams Survivor Contact Sams | Specialist 💌 |
| ADMINISTRATIVELY CLOSE PREGNANCY | Copy | Agtive | Dialea Presedine | |
| ADVANCE DIRECTIVE NOTIFICATION AND SCREENING ADVANCE DIRECTIVE NOTIFICATION AND SCREENING AARBORNE HAZARD/BURN PT REGISTRY INITIAL EVALUATION NOTE BENERICARY TRAVEL (B1) BRUENT PT REGISTRY DIRECTION FOR BREAST CANCER NOTE AARBORNE BURNE | • | Templates Dragger Egclude from Group Bolleplate | Display Only Dnly Show First Line Indent Dialog Items Dne Item Only Hide Dialog Items | |
| Hide Inactive | Hide Inactive | Le i dema | E EVEN | |
| Associated Title: SAMS SURVIVOR CONTACT SAMS SPECIALIST | | | | |
| | | | | |
| Egit Shared Templates Show Template Notes | | | OK Cancel | Apply |

4. Associate the new three (3) reminder dialogs with a shared template in CPRS

To do this, go to Template Editor, then Shared Templates, select the appropriate folder (if applicable), and choose New Template (top right-hand corner).

 a. Type in the following information: Name: SAMS DEATH CERTIFICATE Template Type: Reminder Dialog Reminder Dialog: VA-SAMS DEATH CERTIFICATE Next, select Apply.

| 2 Template Editor | | | | | | х |
|---|------|----------------------------|---|---|---------|--------|
| Edit Action Icols | | | | | New Ter | nplate |
| Shared Templates | | Personal Templates | Shared Template Prope | aties | | |
| Shared Templates | · | > - 🗃 My Templates | Name: SAMS DE/ | ATH CERTIFICATE | | |
| VAAGS MED REVIEW NOTE | | | Template Type: | 📸 Reminder Dialog | | ~ |
| A-PROSTHETICS REQUEST - Gender Altiming Care PVAP Templates | | | Reminder Dialog: | Va-Sams Death Certificate | | • |
| VA-MH COMPACT ACT 201 ENCOUNTER | Copy | , | Agtive | | | |
| Compare det Compare det Compare det SAMS SAMS SAMS SAMS SAMS DEATH CERTIFICATE SAMS SURVIVOR CONTACT CLINICAL SAMS SURVIVOR CONTACT SAMS SPECIALIST SAMS SURVIVOR SAMS SPECIALIST SAMS SAMS SPECIALIST SAMS SURVIVOR SAMS SPECIALIST SAMS SURVIVOR SAMS SPECIALIST SAMS SAMS SAMS SPECIALIST SAMS SAMS SAMS SPECIALIST SAMS SAMS SAMS SPECIALIST SAMS SAMS SAMS SAMS SAMS SAMS SAMS | • | | Templates Drawer Eyclude from Group Bolesplate | Diplay Indented Diplay Only Drly Show First Line Indent Dialog Items One Item Only Hide Dialog Items | | |
| Elide Inactive Delete X | | Hide Inactive 🔹 🕸 Delete 🗙 | | | | |
| | | | | | | |
| Egit Shared Templates Shgw Template Notes | | | | OK Cancel | Ap | ply |

 b. Type in the following information: Name: SAMS SURVIVOR CONTACT CLINICAL Template Type: Reminder Dialog Reminder Dialog: VA-SAMS SURVIVOR CONTACT CLINICAL Next, select Apply.

| Template Editor | | | | | | | | < |
|---|---------|------|----------------------------|---|--------------------|--|------------|-----|
| Edit Action Tools | | | | | | | New Templa | le. |
| Shared Templates | | | Personal Templates | Shared Ter | nplate Prop | erties | | |
| Y 🕼 Shared Templates | ^ | | > 🖪 My Templates | Name | SAMS SU | RVIVOR CONTACT CLINICAL | |] |
| - WET-HOME IONIZING HADIATION IFC | | | | Template T | gpe: | 📸 Reminder Dialog | | ~ |
| A PROSTHETICS REQUEST - Gender Alfinning Care PO IPVAP Templates | | | | Reminder D | ialog: | Va-Sams Survivor Contact Clini | cal 🔤 | • |
| VA-MH COMPACT ACT 201 ENCOUNTER | | Сору | | Agtive | | | | |
| Compare dat Compare dat SAMS SAMS SAMS SAMS SAMS SURVIVOR CONTACT CLINICAL SAMS SURVIVOR CONTACT SAMS SPECIALIST SAMS SURVIVOR CONTACT SAMS SURVIVOR SURVIVOR CONTACT SAMS SURVIVOR SURVIVOR | * | • | | E Fride Templat Dragen E Egolude Group B | from oliesplate | Dialog Projense Dialog Nety Dialog Nety Dialog Nets Dialog Nets Dialog Nets Dialog Nets Dialog Nets Hide Dialog Nets | | |
| Hide Inactive | elete 🗙 | | Hide Inactive 🛧 🖶 Delete 🗙 | | | | | |
| | | | | | | | | |
| Egit Shared Templates Show Template Notes | | | | | | OK Cancel | Apply | |

c. Type in the following information:

Name: SAMS SURVIVOR CONTACT SAMS SPECIALIST Template Type: Reminder Dialog Reminder Dialog: VA-SAMS SURVIVOR CONTACT SAMS SPECIALIST Next, select Apply.

| 🛃 Template Editor | | | – 🗆 X |
|---|---|---------------------------------------|--|
| Edit Action Iools | | | New Template |
| Shared Templates | Personal Templates > - 1 My Templates | Shared Template Prop Name: SAMS SU | erties RVIVOR CONTACT SAMS SPECIALIST |
| VET-HOME ION/ZING RADUATION IFC | | Template Type: | 🔞 Reminder Dialog 🗸 🧹 |
| Compare Annual Compare Annual Compare Annual Compare Compare Annual Comp | Сору | Reminder Dialog: | Va-Sams Survivor Contact Sams Specialist 💌 |
| Compact act SAMS DEATH CERTIFICATE SAMS SURVIVOR CONTACT CLINICAL SAMS SURVIVOR CONTACT SAMS SPECIALIST SAMS SURVIVOR CONTACT SAMS SPECIALIST CONTACT SAMS SPECIALIST ELDER MISTREATMENT SCREENING AND RESPONSE TOOL CONT SODM SCREENER NOTE MEMERGENCY DEPARTMENT GERI-VET SCREENING NOTE | | Egolude from Group Bollesplate | Display Dray Display Dray Dray Show First Line Indent Dislog Items One Item Dray Hide Dislog Items Hide Dislog Items |
| Hide Inactive | Hide Inactive 👚 🖶 Delete 🗙 | · items | L) LOCK |
| | | | |
| Egit Shared Templates Shgw Template Notes | | | OK Cancel Apply |

<< continue to the next page >>

5. In CPRS, go to 'Edit Template Fields' and enter your facility name in the ITEMS box for following template field: VA-SAMS LOCATION

(note: for integrated sites, you can change the 'type' to combo box and enter your facility names in the 'Items' field)

| 🛃 Template Field Editor | | | | | 3 <u>—</u> | | × |
|---|----------------|----------|--------------------|-------------------|--------------|-------------|-------------|
| Action | | | | <u>D</u> elete | <u>С</u> ору | | <u>V</u> ew |
| Template Fields | | Name | VA-SAMS 1 | LOCATION | | | |
| VA-SAMS LOCATION Display Text | | ritanio. | | | | | 11 |
| VA-SAMS LOCATION | Display Te 🔥 | Type: | Text | Field Le | ini. | Text Len | |
| VA-SATISFACTION | * Combo Bo | Items: | ***YOUR | VA LOCATION H | ERE*** | | |
| VA-SCI/D SPOKE SITES | * Combo Bo | | - Charles Vision | | | | |
| VA-SEX HISTORY LINK | Hyperlink | | | | | | |
| VA-SEXUAL HEALTH CDC HIV LINK | Hyperlink | | | | | | |
| VA-SEXUAL HEALTH CDC LINK | Hyperlink | | | | | | |
| VA-SEXUAL HEALTH GUIDE CDC LINK | Hyperlink | | | | | | |
| VA-SEXUAL HEALTH HIV LINK | Hyperlink | | | | | | |
| VA-SEXUAL HEALTH LINK | Hyperlink | Line: 1 | | | | | |
| VA-SEXUAL HEALTH LINK2 | Hyperlink | Col: 28 | | | | | |
| VA-SIGNATURE CONSENT WORKFLOWS | Hyperlink | | | | | | |
| VA-SKILLED CARE NEEDS | Check Boy | LM Text: | | | | | |
| VA-SLEEP (CHECK ALL THAT APPLY) | Display Te | Misce | llaneous | | In | dent . | |
| VA-SLEEP CONCERNS | Check Boy | | ntive | Senarate Lines | Inc | dent Field: | 0 |
| VA-SOFA SCORE | Hyperlink | | | Sopulato Elliso | | | |
| VA-SOFA SCORE 2 | Hyperlink | Red | quired 🔲 🛙 | Exclude From Note | Inc | dent i ext: | U 🗣 |
| VA-SOR COPYRIGHT | Display Te | | | | | | |
| VA-SOR MELANOMA TECHNIQUE | Word Proc | Notes: | | | | | |
| VA-SOR USAGE TEXT | Display Te | 12-5-2 | 3 JBR | | | | |
| VA-SOURCE OF INFORMATION | * Radio Butl | | | | | | |
| VA-SP SUICIDE RISK LINK | Hyperlink | | | | | | |
| VA-SP YES/NO DIGITAL DIVIDE | * Radio Butl 🧹 | | | | | | |
| ☐ Hide Inactive Fields * Indicates a Required Field | Preview | Check | for <u>E</u> rrors | ОК | Cancel | Α | pply |

6. Confirm the PATIENT DATE OF DEATH object is included in the Element: VAL-SAMS DATE OF DEATH. If not, add your site's object for Patient Date of Death

Element: VAL-SAMS DATE OF DEATH DIALOG/PROGRESS NOTE TEXT: PATIENT DATE OF DEATH