

Update \_2\_0\_218

# **Clinical Reminders**

# VA-CSP PHP AND WHOLE HEALTH COACHING Install Guide

September 2021

Product Development Office of Information Technology Department of Veterans Affairs

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## Introduction

In October 2020 the Caregiver Support Program (CSP) implemented changes to the Program of Comprehensive Assistance for Family Caregivers Program that were required under the MISSION Act. In an effort to meet the needs of the expanded population, CSP continues to add additional programs and services for caregivers. CSP is currently implementing Personal Health Planning and Whole Health Coaching with caregivers. Health factors built into the templates will assist with evaluating the program moving forward.

UPDATE\_2\_0\_218 contains 1 Reminder Exchange entry: UPDATE\_2\_0\_218 VA-CSP PHP AND WELLNESS

The exchange file contains the following components:

### TIU TEMPLATE FIELD

VA-TEXT (1-30 CHAR)R VA-TEXT (3 CHAR)R VA-PHP WHOLE HEALTH LIBRARY URL VA-WORDR

### **HEALTH FACTORS**

VA-REMINDER UPDATES [C] **VA-UPDATE 2 0 218** VA-CSP CAREGIVER SELF-EFFICACY [C] VA-CSP PGCSS CG SELF EFF SCORE MISS VA-CSP PGCSS CG SELF EFF SCORE 20 VA-CSP PGCSS CG SELF EFF SCORE 19 VA-CSP PGCSS CG SELF EFF SCORE 18 VA-CSP PGCSS CG SELF EFF SCORE 17 VA-CSP PGCSS CG SELF EFF SCORE 16 VA-CSP PGCSS CG SELF EFF SCORE 15 VA-CSP PGCSS CG SELF EFF SCORE 14 VA-CSP PGCSS CG SELF EFF SCORE 13 VA-CSP PGCSS CG SELF EFF SCORE 12 VA-CSP PGCSS CG SELF EFF SCORE 11 VA-CSP PGCSS CG SELF EFF SCORE 10 VA-CSP PGCSS CG SELF EFF SCORE 9 VA-CSP PGCSS CG SELF EFF SCORE 8 VA-CSP PGCSS CG SELF EFF SCORE 7 VA-CSP PGCSS CG SELF EFF SCORE 6 VA-CSP PGCSS CG SELF EFF SCORE 5 VA-CSP PGCSS CG SELF EFF SCORE 4 VA-CSP PGCSS CG SELF EFF Q4 MISS VA-CSP PGCSS CG SELF EFF Q4 5 VERY VA-CSP PGCSS CG SELF EFF Q4 4 QUITE

VA-CSP PGCSS CG SELF EFF Q4 3 SOME VA-CSP PGCSS CG SELF EFF Q4 2 LITTLE VA-CSP PGCSS CG SELF EFF Q4 1 NOT VA-CSP PGCSS CG SELF EFF Q3 MISS VA-CSP PGCSS CG SELF EFF Q3 5 VERY VA-CSP PGCSS CG SELF EFF Q3 4 QUITE VA-CSP PGCSS CG SELF EFF Q3 3 SOME VA-CSP PGCSS CG SELF EFF Q3 2 LITTLE VA-CSP PGCSS CG SELF EFF Q3 1 NOT VA-CSP PGCSS CG SELF EFF Q2 MISS VA-CSP PGCSS CG SELF EFF Q2 5 VERY VA-CSP PGCSS CG SELF EFF Q2 4 QUITE VA-CSP PGCSS CG SELF EFF Q2 3 SOME VA-CSP PGCSS CG SELF EFF Q2 2 LITTLE VA-CSP PGCSS CG SELF EFF Q2 1 NOT VA-CSP PGCSS CG SELF EFF Q1 MISS VA-CSP PGCSS CG SELF EFF Q1 5 VERY VA-CSP PGCSS CG SELF EFF Q1 4 QUITE VA-CSP PGCSS CG SELF EFF Q1 3 SOME VA-CSP PGCSS CG SELF EFF Q1 2 LITTLE VA-CSP PGCSS CG SELF EFF Q1 1 NOT VA-PHP [C] VA-PHP CHALLENGES VA-PHP SUPPORT CAREGIVER TEAM VA-PHP SUPPORT WHOLE HEALTH COACH VA-PHP SUPPORT WELL BEING TEAM VA-PHP SUPPORT CLINICAL TEAM VA-PHP SUPPORT WHOLE HEALTH PARTNER VA-PHP SUPPORT FRIENDS VA-PHP SUPPORT FAMILY VA-PHP NEXT STEPS VA-PHP SUPPORT TEAM VA-PHP RESOURCES VA-PHP COMMUNITY VA-PHP REFERRAL/CONSULT VA-PHP TREATMENT VA-PHP PREV/SCREENING **VA-PHP SHARED GOALS** VA-PHP HEALTH CONCERNS VA-PHP POWER/MIND VA-PHP SPIRIT AND SOUL VA-PHP FAMILY/FRIENDS VA-PHP RECHARGE VA-PHP FOOD/DRINK VA-PHP PERSONAL DEVELOPMENT VA-PHP SURROUNDINGS

VA-PHP MOVING THE BODY VA-PHP MINDFUL AWARENESS VA-PHP STRENGTHS VA-PHP MY GOAL VA-PHP MAP VA-PHP GOAL UPDATE [C] VA-PHP MOVING THE BODY UPDATE VA-PHP POWER/MIND UPDATE VA-PHP SPIRIT AND SOUL UPDATE VA-PHP FAMILY/FRIENDS UPDATE VA-PHP RECHARGE UPDATE VA-PHP FOOD/DRINK UPDATE VA-PHP PERSONAL DEVELOPMENT UPDATE VA-PHP SURROUNDINGS UPDATE VA-PHP MY GOAL UPDATE VA-CAREGIVER PROGRAM [C] VA-CSP CLIENT EXPCTD GOAL TIME VA-CSP SESSION PURPOSE-POWER OF MIND VA-CSP SESSION PURPOSE-SPIRIT SOUL VA-CSP SESSION PURPOSE-FAM FRIEND COWORK VA-CSP SESSION PURPOSE-RECHARGE VA-CSP SESSION PURPOSE-FOOD AND DRINK VA-CSP SESSION PURPOSE-PERSONAL DEVELOP VA-CSP SESSION PURPOSE-SURROUNDINGS VA-CSP SESSION PURPOSE-WORK THE BODY VA-CSP COACH SESSION DURATION IN MINUTES VA-CSP COACH SESSION NUMBER

### **REMINDER SPONSOR**

OFFICE OF MENTAL HEALTH SERVICES MENTAL HEALTH SERVICES OFFICE OF PATIENT CENTERED CARE AND CULTURAL TRANSFORMATION

### **REMINDER TERM**

VA-REMINDER UPDATE\_2\_0\_218

#### HEALTH SUMMARY TYPE

VA-PHP CHALLENGES VA-PHP HFS VA-PHP GOAL UPDATE VA-PHP NEXT STEPS VA-PHP SUPPORT TEAM VA-PHP RESOURCES VA-PHP COMMUNITY VA-PHP POWER/MIND VA-PHP SPIRIT VA-PHP FAMILY/FRIENDS VA-PHP RECHARGE VA-PHP FOOD/DRINK VA-PHP PERS DEVELOPMENT VA-PHP SURROUNDINGS VA-PHP MOVING THE BODY VA-PHP MINDFUL AWARENESS VA-PHP MINDFUL AWARENESS VA-PHP MY GOAL LAST ONE VA-PHP MY GOALS VA-PHP MAP

#### HEALTH SUMMARY OBJECTS

VA-PHP CHALLENGES2 (TIU) VA-PHP HFS (TIU) VA-PHP GOAL UPDATE (TIU) VA-PHP NEXT STEPS (TIU) VA-PHP SUPPORT TEAM (TIU) VA-PHP RESOURCES (TIU) VA-PHP COMMUNITY (TIU) VA-PHP POWER/MIND (TIU) VA-PHP SPIRIT (TIU) VA-PHP FAMILY/FRIENDS (TIU) VA-PHP RECHARGE (TIU) VA-PHP FOOD/DRINK (TIU) VA-PHP PERS DEVELOPMENT (TIU) VA-PHP SURROUNDINGS (TIU) VA-PHP WORKING BODY (TIU) VA-PHP MINDFUL AWARENESS (TIU) VA-PHP STRENGTHS (TIU) VA-PHP MY GOAL LAST ONE (TIU) VA-PHP MY GOALS (TIU) VA-PHP MAP (TIU)

#### **TIU DOCUMENT DEFINITION**

VA-PHP CHALLENGES2 VA-PHP HFS VA-PHP GOAL UPDATE VA-PHP NEXT STEPS VA-PHP SUPPORT TEAM VA-PHP RESOURCES VA-PHP COMMUNITY VA-PHP POWER/MIND VA-PHP SPIRIT VA-PHP FAMILY/FRIENDS VA-PHP RECHARGE VA-PHP FOOD/DRINK VA-PHP PERS DEVELOPMENT VA-PHP SURROUNDINGS VA-PHP WORKING BODY VA-PHP MINDFUL AWARENESS VA-PHP STRENGTHS VA-PHP MY GOAL LAST ONE VA-PHP MY GOALS VA-PHP MAP

## **REMINDER DIALOG**

VA-CSP PHP PERSONAL HEALTH PLAN VA-CSP WHOLE HEALTH COACHING NOTE

## **Install Details**

This update is being distributed as a web host file. The address for the host file is: https://REDACTED/UPDATE 2 0 218.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 <mark>5</mark> minutes.

# **Install Example**

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

| +     | + Next Screen - Prev Screen           | ı ?? | 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 🥒                    |             |
| Selec | ot Action: Next Screen// LWH Load     | Web  | Host File                   |             |
| Input | the URL for the .prd file: https:     | 1    | /UPDATE_                    | 2_0_218.PRD |
|       | the site for the three takes interpol |      |                             |             |

At the <u>Select Action:</u> prompt, enter <u>LWH</u> for Load Web Host File At the <u>Input the url for the .prd file:</u> prompt, type the following web address: https://Redacted/UPDATE\_2\_0\_218.PRD

You should see a message at the top of your screen that the file successfully loaded.

https://

/UPDATE\_2\_0\_218.PRD successfully loaded.

Search and locate an entry titled **UPDATE\_2\_0\_218 VA-CSP PHP AND WELLNESS** in reminder exchange.

| +Item             | Entry  | Source              | •  | Date Packed        |
|-------------------|--|---------------------|--|--------------------|
| 199               | UPDATE_2_0_218 VA-CSP PHP AND<br>WHOLE HEALTH COACHING                   |                     |  | 09/09/2021@11:14   |
| 200               | UPDATE_2_0_219 VA-CSP  |                     |  | 09/09/2021@04:34   |
| 201               | UPDATE_2_0_22 VA-GATEWAY TO  |                     |  | 05/12/2017@09:36   |
| 202               | UPDATE_2_0_220 VA-RADIOLOGY  |                     |  | 07/01/2021@12:08   |
| 203               | NON VA IMAGE IMPORT<br>UPDATE_2_0_221 VA-RAI FRAILTY<br>SCOPE            |                     |  | 06/30/2021@05:49   |
| +                 | + Next Screen - Prev Scree   | n ??                | More Actions   | >>>                |
| CFE<br>CHF<br>CMM | Create Exchange File Entry<br>Create Host File<br>Create MailMan Message | LHF<br>LMM<br>LR    | Load Host File<br>Load MailMan Mes<br>List Reminder De | sage<br>finitions  |
| DFE               | Delete Exchange File Entry<br>Install Exchange File Entry                | LWH                 | Load Web Host Fi                                       | le<br>Tion Inquiry |
| IH                | Installation History   | RP                  | Repack   |                    |
| Selec<br>Enter    | t Action: Next Screen// IFE Ins<br>a list or range of numbers (1-43      | tall Ex<br>32): 199 | change File Entr<br>)                                  | y                  |

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry Enter the number that corresponds with your entry UPDATE\_2\_0\_218 VA-CSP PHP AND WELLNESS (*in this example it is entry 199. It will vary by site*). The date of the exchange file should be 09/09/2021.

| Compone   | ent   | Category Exists          |
|---|---|--------------------------|
| Source:<br>Date Packed:<br>Package Versi                                    | Lon: 2.0P42   |                          |
| Description:<br>The following<br>REMINDER DIAL<br>VA-CSP WHOL<br>VA-CSP PHP | g Clinical Reminder items were select<br>.OG<br>.E HEALTH COACHING NOTE<br>PERSONAL HEALTH PLAN | ted for packing:         |
| REMINDER TERM<br>VA-REMINDER<br>Non-exchangea                               | 1<br>R UPDATE_2_0_218<br>wble TIU object(s):  |                          |
| TIU Object: P<br>Object Method  | PATIENT NAME<br>I: S X=\$\$NAME^TIULO(DFN)  |                          |
| + Ent   | er ?? for more actions  | >>>                      |
| IA Install<br>Select Action   | all Components IS Inst<br>h: Next Screen// IA   | stall Selected Component |

At the **<u>Select Action</u>** prompt, type <u>IA</u> 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** 

For components that already exists but the packed component is different, choose S to Skip with one exception. For this health factor only, VA-PHP MAP, choose OVERWRITE:

HEALTH FACTORS entry named VA-PHP MAP 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// verwrite the current entry Are you sure you want to overwrite? N// YES. You will be promped to install the FIRST reminder dialog component (VA-CSP PHP PERSONAL HEALTH PLAN). You will choose to install all even though some

components may have an X to indicate that they exist.

| - ·                 |  | -   |   |   |  |  |  | 0 07  |
|---------------------|--|---|---|---|--|--|--|---|
| <u>D1a</u>          | <u>log</u>                             | Comp  | <u>onents</u>   |   | <u>Jun 09, 20210</u>   | 08:36:43   | <u> </u>   | f 27  |
| Рас                 | ked                                    | remi  | nder dialog   | : VA-CSP  | PHP PERSONAL   | . HEALTH PLAN  | [NATIONAL DIALOG]  |   |
| T +                 | m                                      | <b>6</b> 0.4  | Dieleg Fin  | dingo   |  |  | Tuno   | Eviete  |
| 11                  | <u>e</u> III                           | Seq.  | Dialog Fin  | aings<br>Conal HE   |  |  | <u> </u>   | EXISTS  |
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|                     | ۷                                      | 1 10  | Finding *   | NONE*   |  |  | erement  |   |
|                     |  |   | i inding.   | NONE  |  |  |  |   |
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|                     | 4                                      | 4 VA  | -PHP PREVIO   | US DATA   |  |  | aroup  | x   |
|                     |  |   | Findina: *  | NONE*   |  |  | 3  |   |
|                     | 5                                      | 4.10  | VA-PHP PRE  | VIOUS DA  | TA HFS   |  | aroup  | x   |
|                     |  |   | Finding: *  | NONE*   |  |  | Ŭ Î  |   |
|                     | 6                                      | 4.10  | .5 VA-PḦ́P O  | BJ HFS  |  |  | element  | x   |
|                     |  |   | Finding: *  | NONE*   |  |  |  |   |
|                     | 7                                      | 4.15  | BLANK LINE  | DIALOG  | & NOTE   |  | element  | Х   |
| +                   |  | +   | Next Scree  | n - Pr  | ev Screen (  | ?? More Actior   | IS   |   |
| DD                  | D                                      | ialog   | Details   | DT  | Dialog Text  | IS   | Install Selected   |   |
| DF                  | <b>D</b> (                             | ialog   | Findings  | DU  | Dialog Usage   | e QU   | Quit   |   |
| DS                  | <b>D</b> (                             | ialog   | Summary   | IA  | Install All  |  |  |   |
| Sel                 | ect                                    | Acti  | on: Next <mark>S</mark> c   | reen// I  | A  |  |  |   |
| At t                | he S                                   | Selec   | t Action pro  | mpt type  | e IA to install t  | he dialog <sup>.</sup> VA-                               | CSP PHP PERSO  |   |
|                     |  | <u>ы п</u>  | <u>^ NI</u>   | , ., ., ., ., ., ., ., ., ., ., ., ., .,  |  |  |  | .,  |
|                     | ALI                                    |   | AN  | <i></i>   |  |  |  |   |
| Sele                | ect                                    | Action  | 1: Next Scre  | en// <mark>IA I</mark>  | install All  |  |  |   |
| Inst                | tall r                                 | emine   | der dialog ar   | nd all con  | nponents with  | no further cha   | naaa V// <mark>Vaa</mark>  |   |
| Рас                 | ked                                    | remi  | nder dialog   |   |  |  | nges: Y// Yes  |   |
| VA-                 | CSP                                    | PHP   | παςι ατατοά   | : VA-CSP  | PHP PERSONAL   | HEALTH PLAN  | NGES: Y// YES<br>[NATIONĂL DIALOG]   |   |
| It                  | em                                     | 002   | PERSONAL HE   | : VA-CSP<br>Alth Pla  | PHP PERSONAL<br>N (reminder o  | HEALTH PLAN  | NGES: Y// YES<br>[NATIONĂL DIALOG]<br>led from exchange  | file.   |
|                     | 1                                      | ocy.  | PERSONAL HE<br>Dialog Fin   | : VA-CSP<br>ALTH PLA<br>dings   | PHP PERSONAL<br>N (reminder (  | HEALTH PLAN<br>Hialog) instal                            | nges: Y// <b>Yes</b><br>[NATIONĂL DIALOG]<br><mark>.led from exchange</mark><br>Type   | <mark>file.</mark><br>Exists                                      |
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|                     | 2<br>3                                 | VA-<br>1 VA<br>2 VA   | PERSONAL HE<br>Dialog Fin<br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *  | : VA-CSP<br>ALTH PLA<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*  | PHP PERSONAL<br>N (reminder (<br>ALTH PLAN<br>ON<br>ON2  | HEALTH PLAN<br>Hialog) instal                            | nges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element  | <mark>file.</mark><br>Exists<br>X<br>X<br>X                       |
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|                     | 2<br>3<br>4                            | 2 VA<br>4 VA  | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>Finding: *<br>-PHP PREVIO<br>Finding: *   | : VA-CSP<br>ALTH PLA<br>CONAL HE<br>SONAL HE<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*  | PHP PERSONAI<br>N (reminder (<br>ALTH PLAN<br>ON<br>ON2  | HEALTH PLAN<br>Hialog) instal                            | nges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element<br>group   | file.<br>Exists<br>X<br>X<br>X<br>X                               |
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|                     | 2<br>3<br>4<br>5                       | VA-1<br>1 VA<br>2 VA<br>4 VA<br>4.10  | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *<br>VA-PHP PREVIO<br>Finding: *  | : VA-CSP<br>ALTH PLA<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*   | PHP PERSONAI<br>N (reminder (<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS  | HEALTH PLAN  | nges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element<br>group<br>group  | file.<br>Exists<br>X<br>X<br>X<br>X<br>X                          |
|                     | 2<br>3<br>4<br>5<br>6                  | VA-1<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.10                                | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>VA-PHP PRE<br>Finding: *   | : VA-CSP<br>ALTH PLA<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*<br>BJ HFS   | PHP PERSONAI<br>N (reminder (<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS  | HEALTH PLAN  | nges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element<br>group<br>group<br>element   | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X                |
|                     | 2<br>3<br>4<br>5<br>6                  | VA-1<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.10                                | PERSONAL HE<br>Dialog Fin<br>CSP PHP PER<br>-CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-PHP PREVIO<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>.5 VA-PHP O<br>Finding: *   | : VA-CSP<br>ALTH PLA<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*<br>BJ HFS<br>NONE*  | PHP PERSONAI<br>N (reminder of<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS   | HEALTH PLAN  | nges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element<br>group<br>group<br>element   | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X                |
|                     | 2<br>3<br>4<br>5<br>6<br>7             | VA-1<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.10<br>4.15                        | PERSONAL HE<br>Dialog Fin<br>CSP PHP PER<br>-CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-PHP PREVIO<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>.5 VA-PHP O<br>Finding: *<br>BLANK LINE   | : VA-CSP<br>ALTH PLA<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*<br>BJ HFS<br>NONE*<br>DIALOG                                      | PHP PERSONAI<br>N (reminder of<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS<br>& NOTE   | HEALTH PLAN  | nges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element<br>group<br>group<br>element<br>element                              | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X      |
| +                   | 2<br>3<br>4<br>5<br>6<br>7             | VA-1<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.10<br>4.15                        | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *<br>VA-PHP PREVIO<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>5 VA-PHP O<br>Finding: *<br>BLANK LINE<br>Next Scree            | : VA-CSP<br>ALTH PLA<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*<br>BJ HFS<br>NONE*<br>DIALOG<br>N - Pr                            | PHP PERSONAI<br>N (reminder (<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS<br>& NOTE<br>ev Screen   | HEALTH PLAN<br>Hialog) instal                            | Iges: Y/ Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>group<br>group<br>element<br>element  | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X |
| +<br>DD_            | 2<br>3<br>4<br>5<br>6<br>7<br>D        | VA-<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.15<br>+<br>ialog                   | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *<br>VA-PHP PREVIO<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>S VA-PHP O<br>Finding: *<br>BLANK LINE<br>Next Scree<br>Details | : VA-CSP<br>ALTH PLA<br>CONSTRUCT<br>SONAL HE<br>TE VERSI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DATA<br>NONE*<br>BJ HFS<br>NONE*<br>DIALOG<br>N - Pr<br>DT_                           | PHP PERSONAI<br>N (reminder of<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS<br>& NOTE<br>ev Screen<br>Dialog Text                                 | HEALTH PLAN<br>Hialog) instal<br>?? More Action<br>IS    | Iges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>group<br>group<br>element<br>element<br>s<br>Install Selected                | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X |
| +<br>DD<br>DF       | 2<br>3<br>4<br>5<br>6<br>7<br>D.<br>D. | VA-<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.15<br>+<br>ialog<br>ialog          | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *<br>VA-PHP PREVIO<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>DEANK LINE<br>Next Scree<br>Details<br>Findings                 | : VA-CSP<br>ALTH PLA<br>Gings<br>SONAL HE<br>TE VERSI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*<br>BJ HFS<br>NONE*<br>DIALOG<br>N - Pr<br>DT<br>DU                            | PHP PERSONAI<br>N (reminder of<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS<br>& NOTE<br>ev Screen<br>Dialog Text<br>Dialog Usage                 | HEALTH PLAN<br>Hialog) instal<br>More Action<br>IS<br>QU | Inges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>group<br>group<br>element<br>element<br>s<br>Install Selected<br>Quit       | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X      |
| +<br>DD<br>DF<br>DS | 2<br>3<br>4<br>5<br>6<br>7<br>D<br>D   | VA-<br>1 VA<br>2 VA<br>4 VA<br>4.10<br>4.15<br>+<br>ialog<br>ialog<br>ialog | PERSONAL HE<br><u>Dialog Fin</u><br>CSP PHP PER<br>-CSP PHP NO<br>Finding: *<br>-CSP PHP IN<br>Finding: *<br>-PHP PREVIO<br>Finding: *<br>VA-PHP PRE<br>Finding: *<br>BLANK LINE<br>Next Scree<br>Details<br>Findings<br>Summary        | : VA-CSP<br>ALTH PLA<br>dings<br>SONAL HE<br>TE VERSI<br>NONE*<br>TRODUCTI<br>NONE*<br>US DATA<br>NONE*<br>VIOUS DA<br>NONE*<br>BJ HFS<br>NONE*<br>DIALOG<br>N - Pr<br>DT<br>DU<br>IA | PHP PERSONAI<br>N (reminder of<br>ALTH PLAN<br>ON<br>ON2<br>TA HFS<br>& NOTE<br>ev Screen<br>Dialog Text<br>Dialog Usago<br>_Install All | HEALTH PLAN<br>Hialog) instal<br>Nore Action<br>IS<br>QU | Inges: Y// Yes<br>[NATIONAL DIALOG]<br>led from exchange<br>Type<br>dialog<br>element<br>element<br>group<br>group<br>element<br>element<br>Install Selected<br>Quit | file.<br>Exists<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X<br>X      |

After completing this dialog install, you will type Q.

You will be promped to install the next reminder dialog component (VA-CSP WHOLE HEALTH COACHING NOTE). You will choose to install all even though some

components may have an X to indicate that they exist.

| Packe                        | d reminder dialog: <mark>VA-CSP WHOLE HEALTH COACHING NOTE</mark> [NATIONAL DI   | ALOG]      |
|------------------------------|--|------------|
| Item                         | Seq. Dialog Findings Type  | Exists     |
| 1                            | VA-CSP WHOLE HEALTH COACHING NOTE dialog   |            |
| 2                            | 5 VA-CSP WHOLE HEALTH COACHING NOTE VERSION element<br>Finding: *NONE*   |            |
| 3                            | 10 VA-CSP WHOLE HEALTH COACHING SESSION element  |            |
|                              | Finding: VA-CSP COACH SESSION NUMBER (HEALTH FACTOR)   | X          |
| 4                            | PXRM COMMENT prompt  | X          |
| 5                            | 15 VA-CSP WHOLE HEALTH COACHING TIME element<br>Finding: VA-CSP COACH SESSION DURATION IN MINUTES (HEALTH<br>FACTOR)                                     | x          |
| 6                            | PXRM COMMENT prompt  | x          |
| 7                            | 20 VA-GP CSP WHOLE HEALTH COACHING PURPOSE group   |            |
| +<br>DD<br>DF<br>DS<br>Selec | Dialog Details DT Dialog Text IS Install Selec<br>Dialog Findings DU Dialog Usage QU Quit<br>Dialog Summary IA Install All<br>t Action: Next Screen// IA | ted        |
| At the                       | Select Action prompt type IA to install the dialog: VA-CSP WHOLE H   |            |
|                              |  |            |
|                              |  |            |
| Selec                        | t Action: Next Screen// IA Install All   |            |
| Instal                       | reminder dialog and all components with no further changes: Y// Yes  |            |
| Packe                        | d reminder dialog: VA-CSP WHOLE HEALTH COACHING NOTE [NATIONAL DI  | ALOG]      |
| VA-CS                        | P WHOLE HEALTH COACHING NOTE (reminder dialog) installed from exc  | hange file |
| Item                         | Seq. Dialog Findings Type  | <u> </u>   |
| 1                            | VA-CSP WHOLE HEALTH COACHING NOTE dialog   | Х          |
| 2                            | 5 VA-CSP WHOLE HEALTH COACHING NOTE VERSION element<br>Finding: *NONE*   | x          |
| 3                            | 10 VA-CSP WHOLE HEALTH COACHING SESSION element  | х          |
|                              | Finding: VA-CSP COACH SESSION NUMBER (HEALTH FACTOR)   | Х          |
| 4                            | PXRM COMMENT prompt  | Х          |
| 5                            | 15 VA-CSP WHOLE HEALTH COACHING TIME element   | x          |
|                              | Finding: VA-CSP COACH SESSION DURATION IN MINUTES (HEALTH  | Х          |
| 6                            | PXRM COMMENT prompt  | x          |
| 7                            | 20 VA-GP CSP WHOLE HEALTH COACHING PURPOSE group   | х          |
| +                            | + Next Screen - Prev Screen ?? More Actions  |            |
| DD                           | Dialog Details DT Dialog Text IS Install Selec   | ted        |
| DF                           | Dialog Findings DU Dialog Usage QU Quit  |            |
| DS<br>Selec                  | t Action: Next Screen// Q  |            |

After completing this dialog install, you will type Q.

| Component   | Category                   | Exists |
|---|----------------------------|--------|
| Source:   |                            |        |
| Package Version: 2.0P42   |                            |        |
| Description:<br>The following Clinical Reminder items were selected f   | or packing:                |        |
| REMINDER DIALOG<br>VA-CSP WHOLE HEALTH COACHING NOTE  |                            |        |
| VA-CSP PHP PERSONAL HEALTH PLAN   |                            | I      |
| VA-REMINDER UPDATE_2_0_218  |                            |        |
| Non-exchangeable IIU object(s):   |                            |        |
| TIU Object: PATIENT NAME<br>Object Method: S X=\$\$NAME^TIULO(DFN)  |                            |        |
| + + Next Screen - Prev Screen ?? More Act<br>IA Install all Components IS Install<br>Select Action: Next Screen// Q | ions<br>Selected Component | >>>    |

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

Install complete.

# **Post Installation**

- 1. Make the Dialog template available to be attached to a Personal or Shared template or to be able to attach the dialog to a progress note title. Select Reminder Managers Menu <TEST ACCOUNT> 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
  - 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 <TEST ACCOUNT> 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 [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-UP389 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, 390 is not present so I will use 390.

Select Display Sequence: **390** Are you adding 390 as a new Display Sequence? Yes// **YES** Display Sequence: 390// **<Enter>** 390 Clinical Reminder Dialog: **VA-CSP WHOLE HEALTH COACHING NOTE** reminder dialog NATIONAL ....OK? Yes// **<Enter>** (Yes) Select Display Sequence: **391** Are you adding 391 as a new Display Sequence? Yes// **YES** Display Sequence: 391// **<Enter>** 391 Clinical Reminder Dialog: **VA-CSP PHP PERSONAL HEALTH PLAN** reminder dialog NATIONAL ....OK? Yes// **<Enter>** (Yes)

### 2. Setup of Note Titles.

The note titles to create to associate with this template are: CAREGIVER PERSONAL HEALTH PLAN CAREGIVER HEALTH AND WELLBEING COACHING

VHA Enterprise Standard Title: CAREGIVER CERTIFICATE

You can add these to your document class where caregiver notes are located.

**Note:** Comprehensive information on Creating new Document Classes and Titles can be found beginning on page 54 of the TIU/ASU Implementation Guide at the following link: <u>http://www.va.gov/vdl/documents/Clinical/CPRS-</u> <u>Text Integration Utility (TIU)/tiuim.pdf</u>

### 3. Associate the reminder dialogs with the note title in CPRS

a. In CPRS, open the Template Editor, expand Document Titles, select the appropriate folder (if applicable), then click New Template (top right-hand corner).

| nemplate Editor   |                            | – o x   |
|---|----------------------------|---|
| Edit Action I colt:<br>Shared Templates<br>> 2 COMMUNITY NURSING HOME FOLLOW UP VISIT   | Personal Templates Share   | New Template<br>d Template Properties<br>CAREGIVER PERSONAL HEALTH PLAN   |
| PROGRESS NOTE:SC VETERAN APPT REVIEW-INITIAL CONTACT     PROGRESS NOTE:SC VETERAN APPT REVIEW FOLLOW UP     SUICIDE SAFETY PLAN     COVID-19 POC ANTIGEN RESULTS NOTE     COVID-19 POC ANTIGEN RESULTS NOTE   | Tempi<br>Remir             | ate Type: Se Reminder Dialog  |
| COMMUNITY CARE-REQUEST FOR SERVICE<br>PATIENT RECORD FLAG CATEGORY I - HIGH RISK FOR SUICIDE<br>SUICIDE PREVENTION HIGH RISK FLAG CONSULT RESPONSE<br>CAREGIVER PERSONAL HEALTH PLAN-<br>CAREGIVER WHOLE HEALTH COACHING<br>CSP PCAFC CONTINUED ELIGIBILITY NOTE<br>CSP CAREGIVERS FIRST NOTE<br>CSP CAREGIVERS FIRST NOTE<br>CSP CAREGIVERS FIRST NOTE |                            | Number of Blank Lines         Display Double           Index to insert between Annes         Only Show First Line           Index to insert between Annes         Only Show First Line           Number of Blank Lines to insert between Annes         Enck |
| Hide Inactive   Hide Inactive  Associated Title: CAREGIVER PERSONAL HEALTH PLAN   | Hide Inactive 👚 🐺 Delete 🗙 | ×   |
| Egit Shared Templates Show Template Notes   |                            | OK Cancel Apply   |

Type in the following information: Name: Caregiver Personal Health Plan Template Type: Reminder Dialog Reminder Dialog: VA-CSP PHP PERSONAL HEALTH PLAN

Next, type in the Associated Title name – **CAREGIVER PERSONAL HEALTH PLAN** – then click Apply.

b. In CPRS, open the Template Editor, expand Document Titles, select the appropriate folder (if applicable), then click New Template (top right-hand corner).

| -  |                              |  |   |     |
|--|------------------------------|--|---|-----|
| 2 Template Editor  |                              |  | - 0   | ×   |
| Edit Action Icols  |                              |  | New Template  |     |
| Shared Templates   | Personal Templates           | Shared Template Prop                                     | erties  | _   |
| > - COMMUNITY NURSING HOME FOLLOW UP VISIT   | > - 🗾 My Templates           | Name: CAREGIV  | ER HEALTH AND WELLBEING COACHIN   | G   |
| PROGRESS NOTE:SC VETERAN APPT REVIEW-INITIAL CONTACT     PROGRESS NOTE:SC VETERAN APPT REVIEW FOLLOW UP  |                              | Template Type:   | 🗑 Reminder Dialog   | ~   |
| SUICIDE SAFETY PLAN  |                              | Reminder Dialog:   | Va-Csp Whole Health Coaching Note   |     |
| COVID-19 PREVENTIVE HEALTH INVENTORY   | Copy                         | Active   |   |     |
| - COMMUNITY CARE-REQUEST FOR SERVICE   | 1921                         | Hide Items in  | Dialog Properties   |     |
| PATIENT RECORD FLAG CATEGORY 1- HIGH RISK FOR SUICIDE     SUICIDE PREVENTION HIGH RISK FLAG CONSULT RESPONSE     CAREGIVER PERSONAL HEALTH PLAN     CAREGIVER HEALTH AND WELLBEING COACHING     CSP PCAFC CONTINUED ELIGIBILITY NOTE     CSP CAREGIVERS RIRST NOTE     CSP CAREGIVERS RIRST NOTE     CSP CAREGIVERS RIRST NOTE | •                            | Templates<br>Drager<br>Egolude from<br>Group Boilerplate | Origiay Only     Only Show First Line     Indert Dialog Items     One Item Only     Hide Dialog Items |     |
| Hide Inactive 🕈 🕈 Delete 🗙   | 🗹 Hide Inactive 🍵 🐳 Delete 🗙 |  |   |     |
| Associated Title: CAREGIVER HEALTH AND WELLBEING COACHING  |                              |  |   | -   |
|  |                              |  |   |     |
| Egit Shared Templates Show Template Notes  |                              |  | OK Cancel Ap  | ply |

Type in the following information:

Name: Caregiver Health and Wellbeing Coaching Template Type: Reminder Dialog Reminder Dialog: VA-CSP WHOLE HEALTH COACHING NOTE

Next, type in the Associated Title name – CAREGIVER HEALTH AND WELLBEING COACHING – then click Apply.

- 4. Add Local Patient Data Objects
  - a. The reminder dialog group VA-CSP PHP WHAT REALLY MATTERS contains the patient data object PATIENT NAME. If you do not have this patient data object in your Vista system, using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to Group, search for and find the reminder dialog group VA-CSP PHP WHAT REALLY MATTERS and edit the dialog text, replace the dialog text |PATIENT NAME| with text that represents your local patient data object that will display the patient name.
  - b. The reminder dialog element VAL-CSP VETERAN WELLNESS ID FULL NAME contains the patient data object PATIENT NAME. If you do not have this patient data object in your Vista system, using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to Element, search for and find the reminder dialog element VAL-CSP VETERAN WELLNESS ID FULL NAME and edit the dialog text, replace the dialog text |PATIENT NAME| with text that represents your local patient data object that will display the patient name.

- c. The reminder dialog element VAL-CSP VETERAN WELLNESS ID FULL SSN contains the patient data object PATIENT SSN. If you do not have this patient data object in your Vista system, using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to Element, search for and find the reminder dialog element VAL-CSP VETERAN WELLNESS ID FULL SSN and edit the dialog text, replace the dialog text |PATIENT SSN| with text that represents your local patient data object that will display the patient social security number.
- d. The reminder dialog element VAL-CSP VETERAN WELLNESS ID DATE OF BIRTH contains the patient data object PATIENT DATE OF BIRTH. If you do not have this patient data object in your Vista system, using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to Element, search for and find the reminder dialog element VAL-CSP VETERAN WELLNESS ID DATE OF BIRTH and edit the dialog text, replace the dialog text |PATIENT DATE OF BIRTH| with text that represents your local patient data object that will display the patient date of birth.
- e. The reminder dialog element VAL-TH VVC TELEPHONE TRIAGE CONTACT PHONE OBJECT should contain a patient data object representing the patient telephone number. Using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to Element, search for and find the reminder dialog element VAL-TH VVC TELEPHONE TRIAGE CONTACT PHONE OBJECT and edit the dialog text, replace the dialog text \*PHONE OBJECT HERE\* with text that represents your local patient data object that will display the patient phone number.
- f. The reminder dialog element VAL-TH VVC TELEPHONE TRIAGE PATIENT LOCATION HOME should contain a patient data object representing the patient telephone number. Using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to Element, search for and find the reminder dialog element VAL-TH VVC TELEPHONE TRIAGE PATIENT LOCATION HOME and edit the dialog text, replace the dialog text \*PATIENT ADDRESS OBJECT HERE\* with text that represents your local patient data object that will display the patient address.
- g. The reminder dialog group VAL-GP CSP VETERAN WELLNESS VETERAN ADDRESS should contain a patient data object representing the patient address. Using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to group, search for and find the reminder dialog group VAL-GP CSP VETERAN WELLNESS VETERAN ADDRESS and edit the dialog text, replace the dialog text \*\*PATIENT ADDRESS OBJECT HERE\*\* with text that represents your local patient data object that will display the patient address.

h. The reminder dialog group VAL-GP CSP VETERAN WELLNESS VETERAN PHONE should contain a patient data object representing the patient telephone number. Using the Vista Menu, Reminder Dialog manager, Reminder Dialogs, Change view to group, search for and find the reminder dialog group VAL-GP CSP VETERAN WELLNESS VETERAN PHONE and edit the dialog text, replace the dialog text \*\*insert local object here\*\* with text that represents your local patient data object that will display the patient phone number.