



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

Table of Contents

INTRODUCTION 1
INSTALL DETAILS 5
INSTALL EXAMPLE 5
POST INSTALLATION 9

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 STRENGTHS
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.

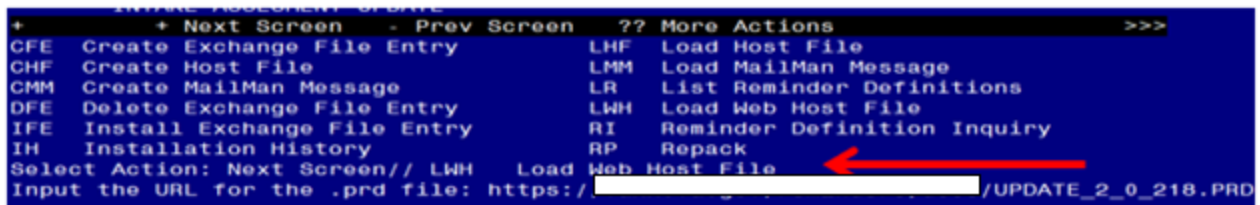
Installation:

=====

This update can be loaded with users on the system. Installation will take less than **5** minutes.

Install Example

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



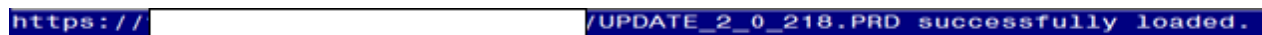
```
+ + Next Screen - Prev Screen ?? More Actions >>>
CFE Create Exchange File Entry LHF Load Host File
CHF Create Host File LMM Load MailMan Message
CMM Create MailMan Message LR List Reminder Definitions
DFE Delete Exchange File Entry LWH Load Web Host File
IFE Install Exchange File Entry RI Reminder Definition Inquiry
IH Installation History RP Repack
Select Action: Next Screen// LWH Load Web Host File
Input the URL for the .prd file: https://[REDACTED]/UPDATE_2_0_218.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_218.PRD

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



```
https://[REDACTED]/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 WELLNESS		09/09/2021@11:14
200	UPDATE_2_0_219 VA-CSP TEMPLATES		09/09/2021@04:34
201	UPDATE_2_0_22 VA-GATEWAY TO HEALTHY LIVING		05/12/2017@09:36
202	UPDATE_2_0_220 VA-RADIOLOGY NON VA IMAGE IMPORT		07/01/2021@12:08
203	UPDATE_2_0_221 VA-RAI FRAILTY SCORE		06/30/2021@05:49

+ + 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 (1-432): 199

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.

Component	Category	Exists
Source: [REDACTED]		
Date Packed: 09/09/2021@11:14:20		
Package Version: 2.0P42		
Description:		
The following Clinical Reminder items were selected for packing:		
REMINDER DIALOG		
VA-CSP WHOLE HEALTH COACHING NOTE		
VA-CSP PHP PERSONAL HEALTH PLAN		
REMINDER TERM		
VA-REMINDER UPDATE_2_0_218		
Non-exchangeable TIU object(s):		

TIU Object: PATIENT NAME		
Object Method: S X=\$\$NAME^TIULO(DFN)		
+ 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.
 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: 0 // **overwrite the current entry**

Are you sure you want to overwrite? N// **YES.**

You will be prompted 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.

```
Dialog Components Jun 09, 2021@08:36:43 Page: 1 of 27
Packed reminder dialog: VA-CSP PHP PERSONAL HEALTH PLAN [NATIONAL DIALOG]

+-----+-----+-----+-----+
| Item | Seq. | Dialog Findings | Type | Exists |
+-----+-----+-----+-----+
| 1 | | VA-CSP PHP PERSONAL HEALTH PLAN | dialog | |
| 2 | 1 | VA-CSP PHP NOTE VERSION | element | |
| | | Finding: *NONE* | | |
| 3 | 2 | VA-CSP PHP INTRODUCTION2 | element | |
| | | Finding: *NONE* | | |
| 4 | 4 | VA-PHP PREVIOUS DATA | group | X |
| | | Finding: *NONE* | | |
| 5 | 4.10 | VA-PHP PREVIOUS DATA HFS | group | X |
| | | Finding: *NONE* | | |
| 6 | 4.10.5 | VA-PHP OBJ HFS | element | X |
| | | Finding: *NONE* | | |
| 7 | 4.15 | BLANK LINE DIALOG & NOTE | element | 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-CSP PHP PERSONAL HEALTH PLAN**

Select Action: Next Screen// **IA Install All**

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

```
Packed reminder dialog: VA-CSP PHP PERSONAL HEALTH PLAN [NATIONAL DIALOG]
VA-CSP PHP PERSONAL HEALTH PLAN (reminder dialog) installed from exchange file.
+-----+-----+-----+-----+
| Item | Seq. | Dialog Findings | Type | Exists |
+-----+-----+-----+-----+
| 1 | | VA-CSP PHP PERSONAL HEALTH PLAN | dialog | X |
| 2 | 1 | VA-CSP PHP NOTE VERSION | element | X |
| | | Finding: *NONE* | | |
| 3 | 2 | VA-CSP PHP INTRODUCTION2 | element | X |
| | | Finding: *NONE* | | |
| 4 | 4 | VA-PHP PREVIOUS DATA | group | X |
| | | Finding: *NONE* | | |
| 5 | 4.10 | VA-PHP PREVIOUS DATA HFS | group | X |
| | | Finding: *NONE* | | |
| 6 | 4.10.5 | VA-PHP OBJ HFS | element | X |
| | | Finding: *NONE* | | |
| 7 | 4.15 | BLANK LINE DIALOG & NOTE | element | 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 be prompted 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.

```
Packed reminder dialog: VA-CSP WHOLE HEALTH COACHING NOTE [NATIONAL DIALOG]
+-----+-----+-----+-----+
| Item | Seq. | Dialog Findings | Type | Exists |
+-----+-----+-----+-----+
| 1 | | VA-CSP WHOLE HEALTH COACHING NOTE | dialog | |
| 2 | 5 | VA-CSP WHOLE HEALTH COACHING NOTE VERSION | element | |
| | | Finding: *NONE* | | |
| 3 | 10 | VA-CSP WHOLE HEALTH COACHING SESSION | element | |
| | | Finding: VA-CSP COACH SESSION NUMBER (HEALTH FACTOR) | | |
| 4 | | PXR COMMENT | prompt | X |
| 5 | 15 | VA-CSP WHOLE HEALTH COACHING TIME | element | |
| | | Finding: VA-CSP COACH SESSION DURATION IN MINUTES (HEALTH FACTOR) | | |
| 6 | | PXR COMMENT | prompt | X |
| 7 | 20 | VA-GP CSP WHOLE HEALTH COACHING PURPOSE | group | |
+-----+-----+-----+-----+
+ + 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-CSP WHOLE HEALTH COACHING NOTE**

Select Action: Next Screen// **IA Install All**

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

```
Packed reminder dialog: VA-CSP WHOLE HEALTH COACHING NOTE [NATIONAL DIALOG]
VA-CSP WHOLE HEALTH COACHING NOTE (reminder dialog) installed from exchange file
+-----+-----+-----+-----+
| Item | Seq. | Dialog Findings | Type | Exists |
+-----+-----+-----+-----+
| 1 | | VA-CSP WHOLE HEALTH COACHING NOTE | dialog | X |
| 2 | 5 | VA-CSP WHOLE HEALTH COACHING NOTE VERSION | element | X |
| | | Finding: *NONE* | | |
| 3 | 10 | VA-CSP WHOLE HEALTH COACHING SESSION | element | X |
| | | Finding: VA-CSP COACH SESSION NUMBER (HEALTH FACTOR) | | X |
| 4 | | PXR COMMENT | prompt | X |
| 5 | 15 | VA-CSP WHOLE HEALTH COACHING TIME | element | X |
| | | Finding: VA-CSP COACH SESSION DURATION IN MINUTES (HEALTH FACTOR) | | X |
| 6 | | PXR COMMENT | prompt | X |
| 7 | 20 | VA-GP CSP WHOLE HEALTH COACHING PURPOSE | group | 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**.

Component	Category	Exists
Source:		
Date Packed: 09/09/2021@11:14:25		
Package Version: 2.0P42		
Description:		
The following Clinical Reminder items were selected for packing:		
REMINDER DIALOG		
VA-CSP WHOLE HEALTH COACHING NOTE		
VA-CSP PHP PERSONAL HEALTH PLAN		
REMINDER TERM		
VA-REMINDER UPDATE_2_0_21B		
Non-exchangeable TIU object(s):		

TIU Object: PATIENT NAME		
Object Method: S X=\$\$NAME^TIULO(DFN)		
+ + 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. **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-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, 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

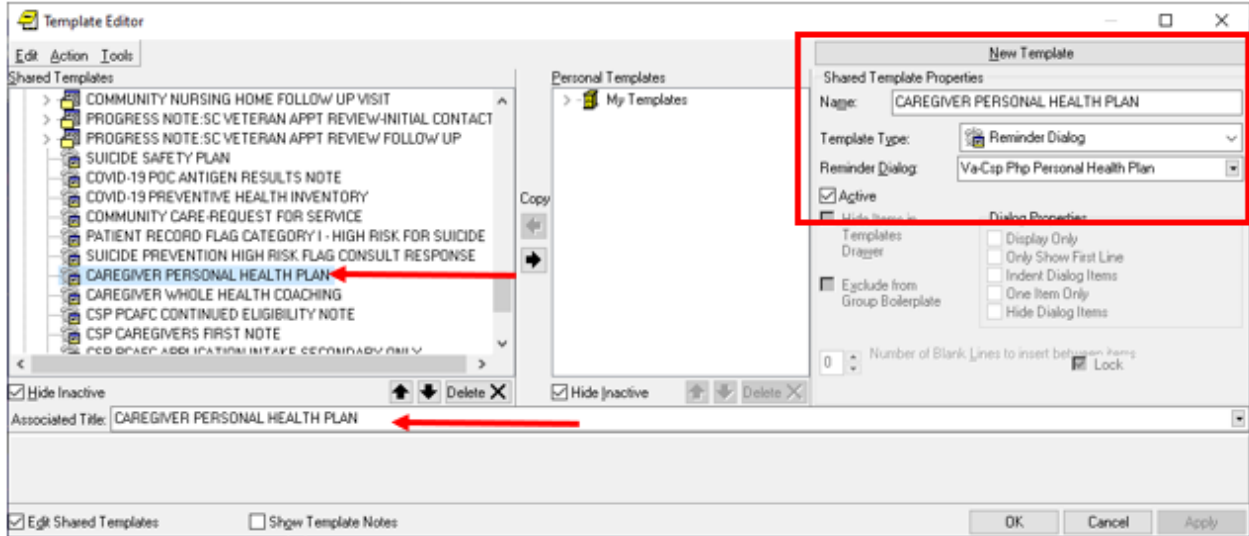
VHA Enterprise Standard Title: CAREGIVER CERTIFICATE

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: [http://www.va.gov/vdl/documents/Clinical/CPRS-Text Integration Utility \(TIU\)/tiuim.pdf](http://www.va.gov/vdl/documents/Clinical/CPRS-Text%20Integration%20Utility%20(TIU)/tiuim.pdf)

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).



Type in the following information:

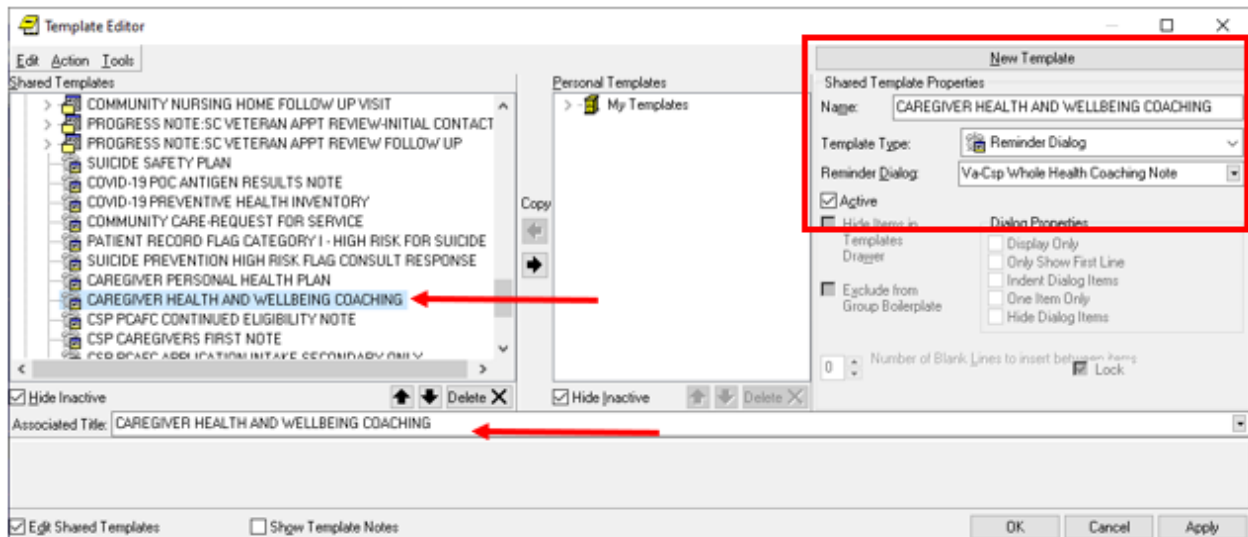
Name: **Caregiver Personal Health Plan**

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).



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.