



**Update \_2\_0\_261**

**Clinical Reminders**

**VA-CARE COORDINATION REVIEW TEAM  
Install Guide**

**May 2023**

Product Development  
Office of Information Technology  
Department of Veterans Affairs

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## Introduction

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Veterans who are identified as having a moderate or complex care coordination need and who either do not have a Lead Coordinator or may benefit from a Lead Coordinator reassignment, are referred to the Care Coordination Review Team (CCRT) for review and recommendations.

Based on the Care Coordination Review Team chart review and interdisciplinary discussion, a Lead Coordinator (i.e., care coordinator, care manager or case manager) from a program/service that fits the Veterans' most prominent need will be assigned as the Lead Coordinator who is the most clinically appropriate for managing this Veteran's care coordination needs.

The Care Coordination Review Team (CCRT) Notification Note template will be used to document the assignment of a Lead Coordinator especially during each transition to another level of care coordination within or outside of the Veteran's current setting. This note will be used in any care coordination, care management or case management program where a Lead Coordinator has been assigned to follow the Veteran.

CC&ICM is a mandated practice that is being implemented in phases across the enterprise. It was endorsed by the VHA Governance Board in April 2021. CC&ICM utilizes the following VHA Directive: **Redacted**

UPDATE\_2\_0\_261 contains 1 Reminder Exchange entry:

**UPDATE\_2\_0\_261 VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION**

**The exchange file contains the following components:**

### **TIU TEMPLATE FIELD**

WORD 2 LINES1 REQ  
VA STORM SCORE  
VA REACH VET SCORE  
VA ACSC SCORE  
VA CAN SCORE

### **HEALTH FACTORS**

VA-REMINDER UPDATES [C]  
VA-UPDATE\_2\_0\_261  
CARE COORDINATION AND INTEGRATED CASE MANAGEMENT [C]  
VA-CCRT PLAN OTHER  
VA-CCRT PLAN NO FOLLOW UP  
VA-CCRT PLAN FU FREQ 90 DAYS  
VA-CCRT PLAN FU FREQ 6 WEEKS  
VA-CCRT PLAN FU FREQ 4 WEEKS

VA-CCRT PLAN FU FREQ 2 WEEKS  
VA-CCRT DUAL OTHER  
VA-CCRT DUAL CAREGIVER SUPPT  
VA-CCRT DUAL SUICIDE PREVENTION  
VA-CCRT DUAL ICMHR  
VA-CCRT DUAL POLYTRAUMA/TBI  
VA-CCRT DUAL HCHV  
VA-CCRT DUAL HUD/VASH  
VA-CCRT DUAL 9/11  
VA-CCRT DUAL HOME TELEHEALTH  
VA-CCRT LEAD OTHER  
VA-CCRT LEAD CAREGIVER SUPPORT  
VA-CCRT LEAD SUICIDE PREVENTION  
VA-CCRT LEAD ICMHR  
VA-CCRT LEAD POLYTRAUMA/TBI  
VA-CCRT LEAD HCHV  
VA-CCRT LEAD HUD/VASH  
VA-CCRT LEAD 9/11  
VA-CCRT LEAD HT  
VA-CCRT PREVIOUS HOME TELEHEALTH  
VA-CCRT PREVIOUS OTHER  
VA-CCRT PREVIOUS CAREGIVER SUPPORT  
VA-CCRT PREVIOUS SUICIDE PREVENTION  
VA-CCRT PREVIOUS ICMHR  
VA-CCRT PREVIOUS POLYTRAUMA/SCI  
VA-CCRT PREVIOUS HCHV  
VA-CCRT PREVIOUS HUD/VASH  
VA-CCRT PREVIOUS 9/11 CASE MANAGEMENT  
VA-CCRT OTHER FACTORS  
VA-CCRT NEED OTHER  
VA-CCRT NEED SELF MANAGEMENT  
VA-CCRT NEED SOCIAL  
VA-CCRT NEED MENTAL/BEHAVIORAL  
VA-CCRT NEED MEDICAL/PHYSICAL  
VA-CCRT LEVEL OF CARE COMMENTS  
VA-CCRT REC LEVEL OF CARE BASIC  
VA-CCRT REC LEVEL OF CARE MODERATE  
VA-CCRT REC LEVEL OF CARE COMPLEX  
VA-CCRT UTILIZATION HOSPITALIZATIONS TRIGGER  
VA-CCRT UTILIZATION NUMBER OF HOSPITALIZATIONS  
VA-CCRT UTILIZATION ER VISITS TRIGGER  
VA-CCRT UTILIZATION NUMBER OF ER VISITS  
VA-CCRT PROGRAM REFERRAL  
VA-CCRT DUPLICATION  
VA-CCRT ADMISSION/READMISSION  
VA-CCRT HIGH RISK STORM RIO

VA-CCRT HIGH RISK REACHVET  
VA-CCRT HIGH RISK ACSC  
VA-CCRT HIGH RISK CAN  
VA-CCRT NOTE  
VA-CCRT REASON FOR REVIEW REASSIGNMENT  
VA-CCRT UTILIZATION NOT APPLICABLE  
VA-CCRT PREVIOUS CARE COORDINATION SERVICES ACCESSED N/A  
VA-CCRT PREVIOUS DOM  
VA-CCRT PREVIOUS PACT  
VA-CCRT PREVIOUS HBPC  
VA-CCRT PREVIOUS SPECIALTY  
VA-CCRT PREVIOUS MH  
VA-CCRT PREVIOUS CC  
VA-CCRT LEAD DOM  
VA-CCRT LEAD PACT  
VA-CCRT LEAD HBPC  
VA-CCRT LEAD SPECIALTY  
VA-CCRT LEAD MH  
VA-CCRT LEAD CC  
VA-CCRT DUAL DOM  
VA-CCRT DUAL PACT  
VA-CCRT DUAL HBPC  
VA-CCRT DUAL SPECIALTY  
VA-CCRT DUAL MH  
VA-CCRT DUAL CC

**REMINDER GENERAL FINDINGS**

TICKLER REMINDER COMMENT  
TICKLER REMINDER

**REMINDER SPONSOR**

NATIONAL OFFICE OF NURSING

**REMINDER TERM**

VA-REMINDER UPDATE\_2\_0\_261

**REMINDER DIALOG**

VA-CCRT CARE COORDINATION REVIEW TEAM 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\\_261.PRD](https://REDACTED/UPDATE_2_0_261.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

```
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_261_4.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\_261.PRD**

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

Item	Entry	Source	Date Packed
281	UPDATE_2_0_261 VA-CARE COORDINATION REVIEW TEAM NOTIFICATION		
282	UPDATE_2_0_262 VA-HERPES ZOSTER IMMUNIZATION UPDATE		
283	UPDATE_2_0_263 VA-COVID-19 CPRS STATUS VERSION 7		
284	UPDATE_2_0_263 VA-COVID-19 CPRS STATUS VERSION 7		
285	UPDATE_2_0_264 VA-SMART		

+ 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 (1-495): 281
```



Search and locate an entry titled **UPDATE\_2\_0\_261 VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION** in reminder exchange.

At the **Select Action** prompt, enter **IFE** for Install Exchange File Entry

Enter the number that corresponds with your entry UPDATE\_2\_0\_261 VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION

(In this example it is entry 281. It will vary by site). The date of the exchange file should be 5/24/2023.

```
Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION

REMINDER TERM
  VA-REMINDER UPDATE_2_0_261

Keywords:

Components:

+      Enter ?? for more actions                                >>>
IA   Install all Components          IS   Install Selected Component
Select Action: Next Screen// IA   Install all Components ...
```

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 **O to Overwrite**.

You will be prompted to install the reminder dialog component (**VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION**). You will choose to install all even though some components may have an X to indicate that they exist.

```
Packed reminder dialog: VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION [NATI
```

Item	Seq.	Dialog Findings	Type	Exists
1		VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION	dialog	
2	10	VA-GP CCRT MASTER GROUP V1	group	
		Finding: VA-CCRT NOTE (HEALTH FACTOR)		X
3	10.10	VA-GP CCRT REASON FOR REVIEW	group	
		Finding: *NONE*		
4	10.10.10	VA-GP CCRT REASON HIGH RISK	group	
		Finding: *NONE*		
5	10.10.10.10	VA-CCRT REASON HIGH RISK CAN	element	
		Finding: VA-CCRT HIGH RISK CAN (HEALTH FACTOR)		X
6		PXRM COMMENT	prompt	X
7	10.10.10.20	VA-CCRT REAS HIGH RISK ACSC 3M RISK	element	
		Finding: VA-CCRT HIGH RISK ACSC (HEALTH FACTOR)		X
8		PXRM COMMENT	prompt	X
9	10.10.10.30	VA-CCRT REASON HIGH RISK REACHVET	element	
+    + 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-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION**

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

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

```
VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION (reminder dialog) installed f
```

Item	Seq.	Dialog Findings	Type	Exists
1		VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION	dialog	X
2	10	VA-GP CCRT MASTER GROUP V1	group	X
		Finding: VA-CCRT NOTE (HEALTH FACTOR)		X
3	10.10	VA-GP CCRT REASON FOR REVIEW	group	X
		Finding: *NONE*		
4	10.10.10	VA-GP CCRT REASON HIGH RISK	group	X
		Finding: *NONE*		
5	10.10.10.10	VA-CCRT REASON HIGH RISK CAN	element	X
		Finding: VA-CCRT HIGH RISK CAN (HEALTH FACTOR)		X
6		PXRM COMMENT	prompt	X
7	10.10.10.20	VA-CCRT REAS HIGH RISK ACSC 3M RISK	element	X
		Finding: VA-CCRT HIGH RISK ACSC (HEALTH FACTOR)		X
8		PXRM COMMENT	prompt	X
9	10.10.10.30	VA-CCRT REASON HIGH RISK REACHVET	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 Quit				

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



```

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION

REMINDER TERM
  VA-REMINDER UPDATE_2_0_261

Keywords:

Components:

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

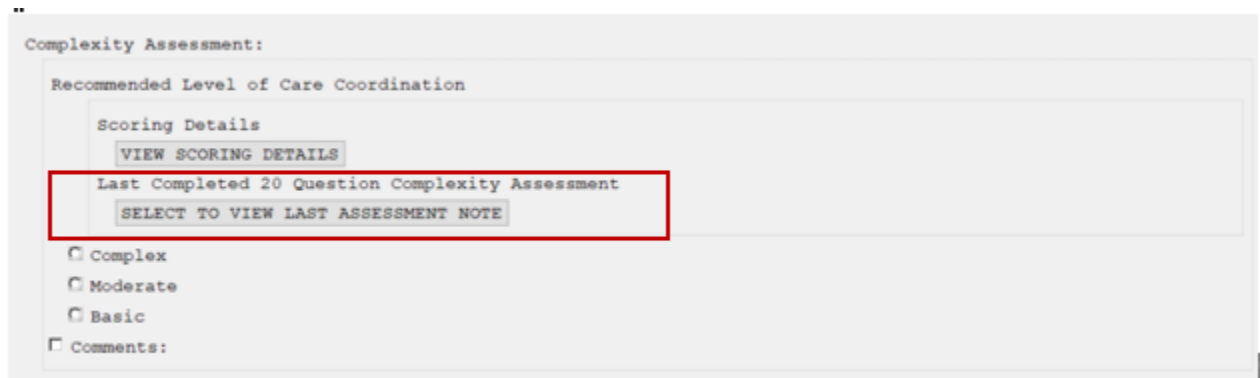
```

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

Install complete.

## Post Installation

1. (Optional) Insert local data object to display the last completed 20 Question Complexity Assessment into the VAL-CCRT COMPLEXITY ASSESSMENT BUTTON dialog element. The element is deployed disabled. Enable the element to view the button in the dialog.



```

NAME: VAL-CCRT COMPLEXITY ASSESSMENT BUTTON
DISABLE: DISABLE AND DO NOT SEND MESSAGE// @ Enter "@" to enable the button
SURE YOU WANT TO DELETE? Yes
CLASS: LOCAL//
SPONSOR:
REVIEW DATE:
RESOLUTION TYPE:
ORDERABLE ITEM:
Finding item: GF VIEW PROGRESS NOTE TEXT
FINDING ITEM: VIEW PROGRESS NOTE TEXT//

```

Additional findings: none  
 Select ADDITIONAL FINDING:

DIALOG/PROGRESS NOTE TEXT:  
Last Completed 20 Question Complexity Assessment

Edit? NO//

ALTERNATE PROGRESS NOTE TEXT:

(Insert local data object to pull in last completed 20 Question Complexity Assessment here)

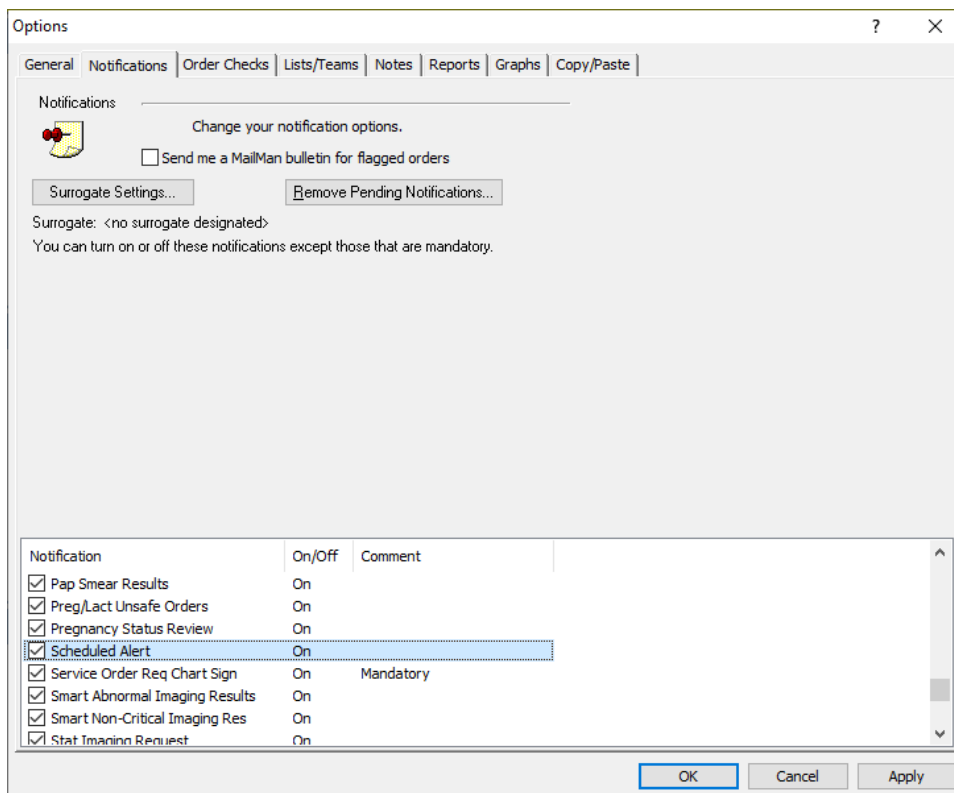
Edit? NO// **YES**

==[ WRAP ]==[INSERT ]=====< ALTERNATE PROGRESS NOTE[Press <PF1>H for help]====  
(Insert local data object to pull in last completed 20 Question Complexity Assessment here) **Replace existing text with local date object. Save and exit element.**

<=====T=====T=====T=====T=====T=====T=====T=====T=====T=====T>=====

**2. Notify users of this dialog they must have the notification Scheduled Alert set to On to receive the tickler alert.**

- a. The tickler alert option in the template will send the user an alert for the date/time that they specify.
- b. To receive this alert, the scheduled alert notification must be enabled



3. **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
<b>TIU</b>	<b>TIU Template Reminder Dialog Parameter</b>
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-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION** reminder dialog NATIONAL  
...OK? Yes// <Enter> (Yes)

#### 4. Setup of Note Title (optional).

The note title to create to associate with this template is: **CARE COORDINATION REVIEW TEAM NOTE**

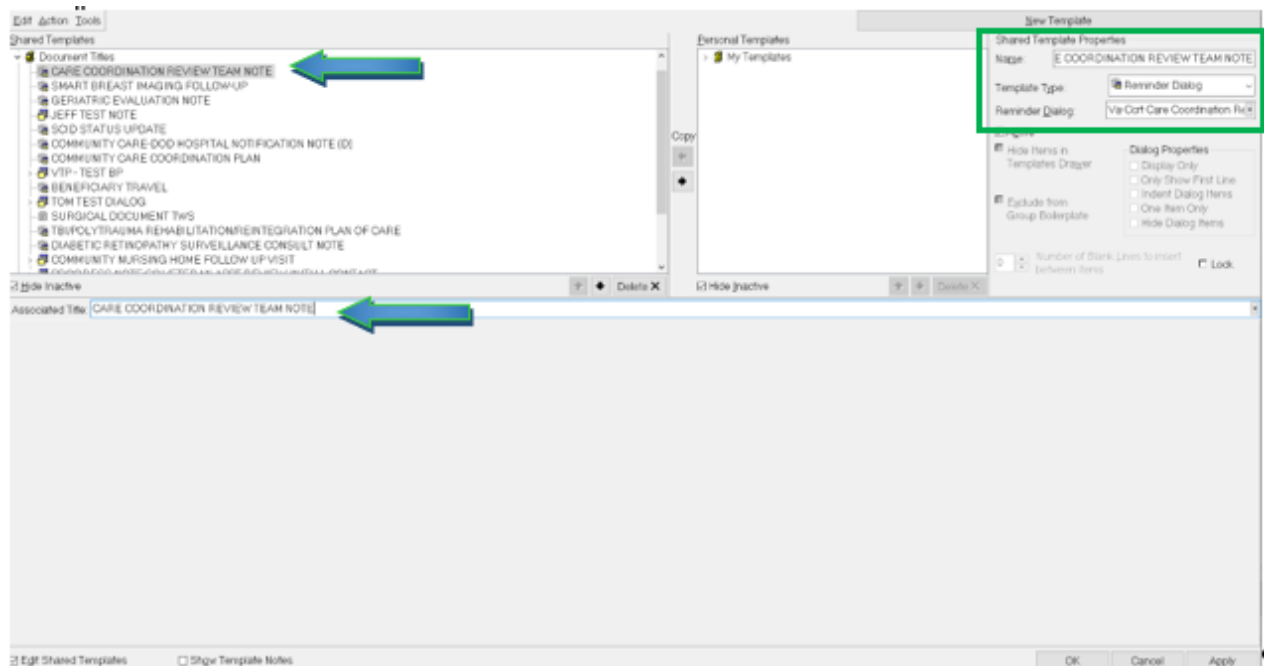
VHA Enterprise Standard Title: NURSING NOTE

You can add this to the appropriate document class.

**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)

#### 5. Associate the reminder dialog with the note title in CPRS

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



Type in the following information:

Name: **CARE COORDINATION REVIEW TEAM NOTE**

Template Type: **Reminder Dialog**

Reminder Dialog: **VA-CCRT CARE COORDINATION REVIEW TEAM NOTIFICATION**

Next, type in the Associated Title name — then click Apply.