



Update \_2\_0\_289

## **Clinical Reminders**

# **VA-CARE COORDINATION & INTEGRATED CASE MANAGEMENT (CC&ICM) COMPLEXITY ASSESSMENT TOOL Install Guide**

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Product Development  
Office of Information Technology  
Department of Veterans Affairs

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## Introduction

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The CC&ICM Complexity Assessment tool helps determine the appropriate level of care coordination by reviewing aspects of Maslow's Hierarchy of Needs to assess a Veteran's most prominent need(s). The level of care coordination varies and is impacted by multiple dimensions of health. All domains of health are assessed to determine the appropriate level of care coordination, to include Self-Management, Mental Health/Behavioral Health, Social, and Medical/Physical. The Complexity Assessment tool identifies a Veteran at one of the three levels of care coordination: Basic, Moderate, or Complex. The care manager usually delivers moderate care coordination, while the case manager typically delivers complex care coordination. Basic care coordination is delivered by all team members, including administrative staff. The CC&ICM framework currently offers one complexity assessment tool to use in facility implementation. A facility must utilize the 20-question tool, to assess the four different domains of health in determining the appropriate level of care coordination.

### Who is(are) the representative user(s):

Any staff who want the Care Coordination Review Team (CCRT) to review their Veteran to decide of who would be the most appropriate to serve as the Lead Coordinator will complete the 20 Question Complexity Assessment. This could include any of the following: providers (i.e. physicians, nurse practitioners and physician assistants), mental health specialists, pharmacists, ethics committee members, Physical Medicine & Rehabilitation Services, specialty services, Geriatric & Extended/Non-Institutional Care, Whole Health, Patient Aligned Care Team etc.

Staff from any of the following programs could also complete the 20 Question Complexity Assessment:

- M2VA Program
- Homeless Program
- Mental Health Intensive Case Management (MHICM)/RANGE Program
- Suicide Prevention Program
- Caregiver Support Program
- Home Telehealth
- PACT Social Work
- PACT Nursing
- Specialty Care Nursing
- Mental Health Nursing
- Mental Health Social Work
- Residential Treatment/DOM Case Management
- Inpatient Care Coordination
- Acute Care Social Worker
- Whole Health Program
- Community Care
- Medicine Service
- Ambulatory Care Service

- Mental Health Service

**The CCICM20 mental health instrument will be distributed as a host file.**

UPDATE\_2\_0\_289 contains 1 Reminder Exchange entry:

**UPDATE\_2\_0\_289 VA-CC&ICM COMPLEXITY ASSESSMENT**

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

**TIU TEMPLATE FIELD**

EDIT 45(REQUIRED)

EDIT 20+ REQ

WORD 2 LINES INDENT 2 REQ

**HEALTH FACTORS**

VA-CARE COORDINATION AND INTEGRATED CASE MANAGEMENT [C]

VA-CC&ICM COMPLEXITY ASSMT NOTE DONE

VA-REMINDER UPDATES [C]

VA-UPDATE\_2\_0\_289

**REMINDER SPONSOR**

NATIONAL OFFICE OF NURSING

**REMINDER TERM**

VA-REMINDER UPDATE\_2\_0\_289

**REMINDER DIALOG**

VA-CC&ICM COMPLEXITY ASSESSMENT TOOL

## **Pre Installation**

---

1. **Coordinate with nursing to identify local consult order to the Care Coordination Review Team.**

## **Install Details**

The CCICM20 mental health instrument will be distributed as a host file. The address for the instrument is: **CCICM20.JSON**

This update is being distributed as a web host file. The address for the host file is:

**[https://REDACTED/UPDATE\\_2\\_0\\_289.PRD](https://REDACTED/UPDATE_2_0_289.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 10 minutes.

## Install Example

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First, load the new mental health instrument using the Instrument Exchange Menu (YTQ INSTRUMENT EXCHANGE) in Vista. **The secondary menu of YTQ INSTRUMENT EXCHANGE is required to install this update.** THIS IS NOT REMINDER EXCHANGE.

To Load the exchange file, use LH Load Host File. The URL is /REDACTED/CCICM20.JSON

```
Instrument Exchange File Entries
+-----+-----+-----+
| Entry | Source | Created |
+-----+-----+-----+
1  VFQ20-READY-FOR-REMINDER
2  YS*5.01*121 NEW INSTRUMENTS
3  YS*5.01*121 UPDATES
4  YS*5.01*123 INSTRUMENT UPDATE
5  YS*5.01*134 T10C4
6  YS*5.01*136
7  YS*5.01*137
8  YS*5.01*139
9  YS*5.01*139
10 YS*5.01*141 AUDC UPDATE
+-----+-----+-----+
+      Enter ?? for more actions
+-----+-----+-----+
CE (Create New Entry)  CH (Create Host File)  DR Trial Install <Dry Run>
RB (Rebuild Entry)   LH Load Host File      IE Install Exchange Entry
DL Delete Entry       LU Load from URL       BR Browse Specification
Select Action: Next Screen// lh Load Host File
Enter file name: , /REDACTED/CCICM20.JSON
```

You will see this prompt:

```
This will load: CCICM20-B3
                created on: 01/20/2023@11:43:55
                source REDACTED
Description ---
                (no description)
Do you want to continue? Yes// YES
```


Search and locate an entry titled **CCICM20 FOR REMINDER** in instrument exchange.



```

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_289.PRD

```




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

+Item	Entry	Source	Date Packed
385	UPDATE_2_0_289 VA-CC&ICM COMPLEXITY ASSESSMENT		
386	UPDATE_2_0_29 VA-HOMELESSNESS FOOD INSECURITY		
387	UPDATE_2_0_290 VA-TELECRITICAL CARE NOTE		
388	UPDATE_2_0_294 VA-GEC PERSONAL CARE SERVICES REVIEW		
389	UPDATE_2_0_295 VA-DIAGNOSTIC IMAGING ORDER REVIEW		

```

+      + 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 (1-629): 385

```



Search and locate an entry titled **UPDATE\_2\_0\_289 VA- CC&ICM COMPLEXITY ASSESSMENT** 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\_289 VA-CC&ICM COMPLEXITY ASSESSMENT (*In this example it is entry 385. 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-CC&ICM COMPLEXITY ASSESSMENT TOOL

REMINDER TERM
  VA-REMINDER UPDATE_2_0_289

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-CC&ICM COMPLEXITY ASSESSMENT TOOL**). You will choose to install all even though some components may have an X to indicate that they exist.

Item	Seq.	Dialog Findings	Type	Exists
1		VA-CC&ICM COMPLEXITY ASSESSMENT TOOL	dialog	
2	10	VA-GP CC&ICM COMPLEXITY ASSESSMENT TOOL MASTER GROUP V1	group	
		Finding: *NONE*		
3	10.10	VA-BLANK LINE DIALOG & NOTE	element	X
		Finding: *NONE*		
4	10.20	VA-CC&ICM PURPOSE AND INTENT	element	
		Finding: VA-CC&ICM COMPLEXITY ASSMT NOTE DONE (HEALTH FACTOR)		X
5	10.30	VA-BLANK LINE DIALOG & NOTE	element	X
		Finding: *NONE*		
6	10.40	VA-GP CC&ICM SELF-MANAGEMENT	group	
		Finding: *NONE*		
7	10.40.10	VA-GP CC&ICM ABILITY TO COMMUNICATE	group	
<b>+</b> + Next Screen - Prev Screen ?? More Actions				
DD	Dialog Details		DT	Dialog Text
DF	Dialog Findings		DU	Dialog Usage
DS	Dialog Summary		IA	Install All
Select Action: Next Screen// <b>IA Install All</b>				

At the **Select Action** prompt, type **IA** to install the dialog: **VA-CC&ICM COMPLEXITY ASSESSMENT TOOL**).

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

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



Item	Seq.	Dialog Findings	Type	Exists	
1		VA-CC&ICM COMPLEXITY ASSESSMENT TOOL	dialog	X	
2	10	VA-GP CC&ICM COMPLEXITY ASSESSMENT TOOL MASTER GROUP V1	group	X	
		Finding: *NONE*			
3	10.10	VA-BLANK LINE DIALOG & NOTE	element	X	
		Finding: *NONE*			
4	10.20	VA-CC&ICM PURPOSE AND INTENT	element	X	
		Finding: VA-CC&ICM COMPLEXITY ASSMT NOTE DONE (HEALTH FACTOR)		X	
5	10.30	VA-BLANK LINE DIALOG & NOTE	element	X	
		Finding: *NONE*			
6	10.40	VA-GP CC&ICM SELF-MANAGEMENT	group	X	
		Finding: *NONE*			
7	10.40.10	VA-GP CC&ICM ABILITY TO COMMUNICATE	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 Quit					

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

```

Description:
The following Clinical Reminder items were selected for packing:
REMINDER DIALOG
  VA-CC&ICM COMPLEXITY ASSESSMENT TOOL

REMINDER TERM
  VA-REMINDER UPDATE_2_0_289

Keywords:

Components:

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

```

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

Install complete.

## Post Installation

1. Insert local Care Coordination Review Team consult order and edit text fields in the VAL-CC&ICM COMPLEXITY OPTIONAL ORDER element. If no local consult exists, this element can be disabled.

```

NAME: VAL-CC&ICM COMPLEXITY OPTIONAL ORDER
DISABLE:
CLASS: LOCAL//
SPONSOR:
REVIEW DATE:
RESOLUTION TYPE:

```

ORDERABLE ITEM:

FINDING ITEM: Enter "Q." then name of local Care Coordination Review Team consult order dialog

Additional findings: none

Select ADDITIONAL FINDING:

DIALOG/PROGRESS NOTE TEXT:

(Add local text e.g. "Select here to launch consult to Care Coordination Review Team upon completion of this template")

Edit? NO// **YES**

==[ WRAP ]==[INSERT ]=====< DIALOG/PROGRESS NOTE TE[Press <PF1>H for  
(Add local text e.g. "Select here to launch consult to Care Coordination Review Team upon completion of this template")

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

ALTERNATE PROGRESS NOTE TEXT:

(Add local text e.g. "Consult submitted to Care Coordination Review Team")

Edit? NO// **YES**

==[ WRAP ]==[INSERT ]=====< ALTERNATE PROGRESS NOTE T[Press <PF1>H for  
(Add local text e.g. "Consult submitted to Care Coordination Review Team")

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

**2. 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>**

Clinical Reminder Dialog: **VA-CC&ICM COMPLEXITY ASSESSMENT TOOL**  
reminder dialog

...OK? Yes// **<Enter>**

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

The note title to create to associate with this template is: **CARE COORDINATION COMPLEXITY ASSESSMENT TOOL**

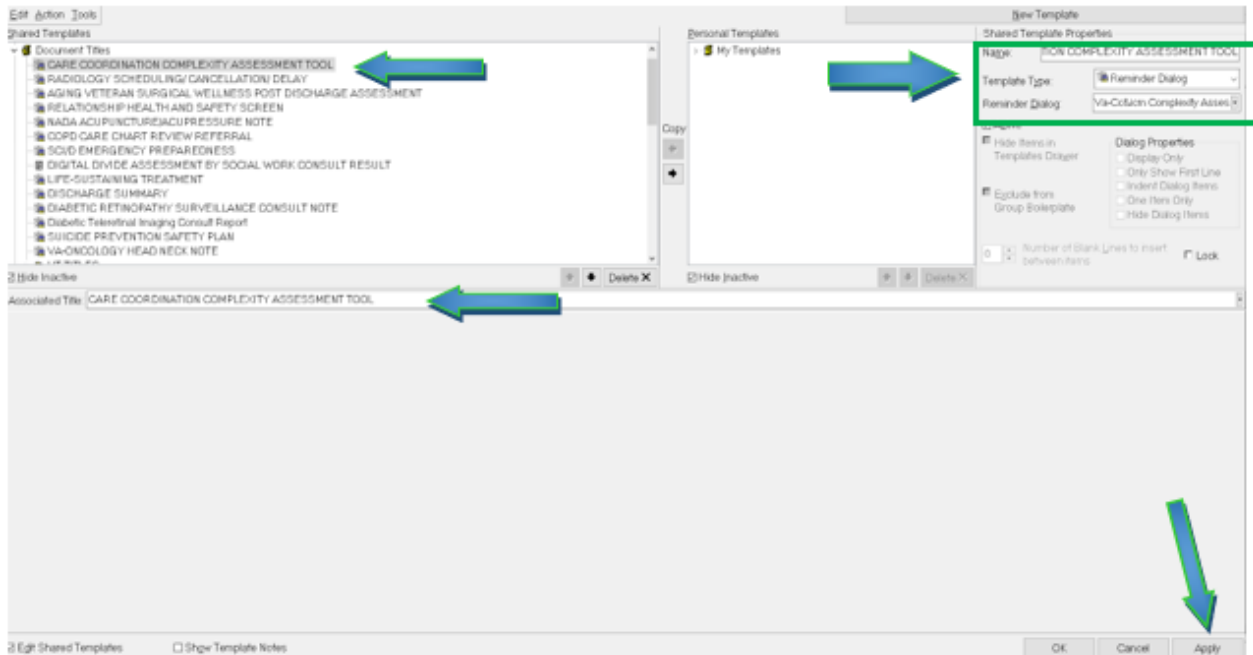
VHA Enterprise Standard Title: NURSING NOTE

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)*

#### 4. 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 COMPLEXITY ASSESSMENT TOOL**

Template Type: **Reminder Dialog**

Reminder Dialog: **VA-CC&ICM COMPLEXITY ASSESSMENT TOOL**

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