

## Clinical Procedure Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Install CP exe on workstation – both Manager and User module			Requires user to have MD GUI Manager option.
2. Determine which procedures you will be processing via clinical procedures. This will determine what TIU documents and consults you will need to establish.			
3. TIU – Separate Class for Clinical Procedures			
A. Create CP Document Classes(DC) and Titles			Recommended to prefix DC and titles with CP
B. Define CP Class parameters within TIU. Since they are not part of the Progress Notes class, they will not inherit parameters			
C. Review TIU Upload Parameters for CP Class			
4. ASU – Business rules will need to be established for CP documents. See the implementation guide, Section 5 for the list of rules. User Role – Interpreter; verify it is active.			
5. Populate the CP Definition file (#702.01). Run INIT^MDPOST. This will automatically populate the CP definition file with a list of known procedures. A site can choose not to run this and add procedures manually. (see 6C)			
6. Using the CP Manager			This requires the option, MD GUI Manager to be assigned to the individual.
A. Edit System Parameters <ul style="list-style-type: none"> <li>1) Clinical Procedures on-line</li> <li>2) VistA Scratch HFS Directory</li> <li>3) CP/BGP Transfer Directory*             <ul style="list-style-type: none"> <li>(a) The shared directory that is accessed by the</li> </ul> </li> </ul>			*Requires Imaging system.

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Imaging Background Processor (BGP) and CP Gateway.			
<p>B. Set up Instruments – the following fields will need to be verified/populated for the instruments your site will be using:</p> <ol style="list-style-type: none"> <li>1) Instrument Name</li> <li>2) Printable Name</li> <li>3) M Routine</li> <li>4) Pkg. Code</li> <li>5) Valid Attachment Types</li> <li>6) If Bi-Directional Instrument is checked: <ol style="list-style-type: none"> <li>(a) HL7 Inst ID</li> <li>(b) HL7 Link</li> </ol> </li> <li>7) Notification Mail group</li> <li>8) Active</li> </ol>			<p>Run the instrument analyzer once you have set-up the instrument (wrench icon)</p> <p>Be sure the notification mail group, MD Device Errors, is populated.</p>
<p>C. Edit Procedures – If the procedures were exported, they will need to be edited as needed. If you did not run the post-init, you will need to click on the icon for new procedure.</p> <ol style="list-style-type: none"> <li>1) Edit the procedures in the Unassigned Folder for each procedure you want to activate: <ol style="list-style-type: none"> <li>(a) Treating Specialty</li> <li>(b) TIU Note Title</li> <li>(c) Hospital Location</li> <li>(d) Associate Instrument</li> <li>(e) Check the Active box</li> </ol> </li> </ol>			<p>Requires PIMS to have established Treating Specialties and Hospital Locations.</p> <p>Clinic usages: You can have a count clinic to be used by CP and a non-count clinic used for just scheduling OR you can have one count clinic used for both scheduling and CP.</p>
<p>7. Consult Services for CP – Work with CAC to create consult services for the CP procedures you activate/created in the previous step. Be sure to prefix the consult service name with CP.</p> <p>A. To define an interpreter(s), enter data in any of the</p>			

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following fields: - INDIVIDUAL TO NOTIFY - SERVICE TEAM TO NOTIFY - NOTIFICATION BY PT LOCATION - UPDATE USERS W/O NOTIFICATIONS - UPDATE TEAMS W/O NOTIFICATIONS			
8. Consult Procedures – Use the consult option, Setup Procedures to create the procedure that will be used in the ordering menus and link it to the CP procedure created previously. Again, the consult procedure should be prefix with CP. A. The field, Related Services, is filled in with the corresponding consult request service(s). B. The field, Clinical Procedure, is where the CP procedure is entered.			
9. CPRS A. Check with the CAC to activate the Consult/Proc Interpretation Notification as appropriate for your site. B. Add CP User to the CPRS Tools Menu			
10. HL7 set-up. MCAR OUT is automatically created during the installation of CP for reference purposes.			
A. Create a MCAR XXXX in file #870 for each bi-directional device by copying the released MCAR OUT. Name the entry based on the instrument. Each entry needs its own IP and port which agree with the device configuration. Be sure to verify the port assignment with the vendor.			This is the HL7 link that sends the order from VistA to the Device.
B. The Protocol file (#101) is set during installation. Verify Protocol settings in file 101. 1) MCAR DEVICE CLIENT 2) MCAR DEVICE SERVER			

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<p>C. Setting up Port 5000 (Multi-Listener)</p> <ol style="list-style-type: none"> <li>1) Edit MCAR DEVICE CLIENT so the logical link points to VAXXX (where xxx is an abbreviation for the hospital).</li> <li>2) Make sure all CP Medical devices are sending to VAXXX link.</li> </ol>			<p>Give vendor the IP and port for the VAXXX link for sending back the reports.</p>
<p>11. Configuring the Automated Instrument Share Folder for the Imaging Background Processor to copy.</p>			
<p>A. The medical device shared directory is used to store the documents. It needs to be available to the VistA Imaging background processor.</p>			
<ol style="list-style-type: none"> <li>1) Obtain the share directory name from the vendor when the device is installed.</li> <li>2) Obtain the names of the VistA Imaging User (IU) and VistA Imaging Administrator (IA) accounts that are used when starting up the VistA Imaging background processor. Add the IU and IA accounts with full security privileges to the share directory.</li> <li>3) The medical device and the Imaging background processor must be on the same Windows domain.</li> </ol>			<p>You need administration privileges to complete the setup.</p>
<p>12. CP Gateway – contained in the MD1_0.exe</p> <ol style="list-style-type: none"> <li>A. The Clinical Procedure application utilizes the RPC Broker connection to the VistA server for operation. Before installing the application, insure that the workstation has connectivity to the required server via the RPC Broker.</li> <li>B. Install the CP Gateway on a workstation in a secure area, as it must remain active at all times for polling purposes. Only one workstation should be running this CP Gateway.</li> </ol>			
<p>13. Assign RPC Broker options to appropriate staff, MD GUI USER.</p>			

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14. If site is running CP HEMO, additional set-up is required.			