Electronic Medical Record (OE/RR) Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. OE/RR Version 3.0 (CPRS)			
A. All of the site parameters will need to be determined for the system. There is room for DIVISION/LOCATION specifications within the package for hospital locations and for applications.			
B. Using the CPRS Configuration (Clin Coord) menu within [ORMGR], and then using the option MI-**Miscellaneous Parameters,** 1) The fields are as follows:			The menu, General Parameter Tools [XPAR TOOLS MENU], is a helpful menu to display existing parameters. The option, List Values for a Selected Entity, will display all parameters for the entity chosen (i.e. System, Division, and Location.)
a) Active Orders Context Hours – this parameter defines the number of hours that orders remain in the "Active/Current Orders" context after they have been completed.			
b) Allow Clerks to act on Med Orders - This parameter determines if holders of the OREMAS key are allowed to act on medication orders.			
c) Allow Clerks to act on Non-VA Med Orders – This is the same as the above parameter except it refers to Non-VA Med Orders.			
d) Auto Unflag - This parameter, when set to YES, will automatically cancel the Flag Orders Notification and unflag all orders for a patient when a user processes a Flagged Orders Notification.			

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e) Confirm Provider - This field will allow an additional prompt to confirm the provider selection when adding new orders.			
f) Default Provider - This parameter allows the attending physician to be prompted as a default when adding new orders.			
g) Error Days - Enter the number of days to keep the OE/RR Error file current.			
h) Grace Days before Purge - This parameter is the number of days that should pass before an order is purged.			
i) New Order Default - This parameter determines the default action to be presented at the end of the Review New Orders screen.			
j) Restrict Requestor - This field allows a site to restrict the selection of providers when adding new orders at the 'Requesting CLINICIAN: ' prompt for holders of the ORELSE and OREMAS key.			
k) Review on Patient Movement - This parameter allows orders to be reviewed when a patient is transferred or discharged, and when a clinic appointment is made or canceled.			
l) Show Lab # - This field controls the listing of lab orders for holders of the ORES key, after the electronic signature has been entered when entering new orders.			
m) Show Status Description - This parameter allows the description associated with a status to be displayed with the current status of an order when			

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a detailed display is requested.			
n) Signature Default Action - This defines the default action presented to ORELSE key holders when signing and/or releasing orders; if no value is entered, then 'Release w/o Signature' will be used.			
o) Signed on Chart Default - This defines the default value to be presented when the user gets the prompt to mark orders as Signed on Chart; if no value is entered, then NO is used as the default.			
C. The Clinical Coordinator will need to decide on standardized print formats for service copies, chart copies, etc., to be used in system. Since there is NO way to enter MULTIPLE CHART COPY OR SERVICE COPY TYPES for a hospital site, requesting hospital locations will need to be educated on THE ONE standardized format. Different LABEL, REQUISITION, SERVICE COPY formats can be created for different PACKAGE SITE PARAMETERS, but there can only be one per package. **Use the FP – Print Formats** option to edit/create the agreed upon formats.			
1) Then, using the Print/Report Parameters option found in the CPRS Configuration (Clin Coord) menu within [ORMGR], setup the following parameters.			
a) Use the CC – Chart Copy Parameters option to review entries. There can only be one Chart copy setup per facility.			
(1) Chart Copy Format			
(2) Chart Copy Header			
(3) Chart Copy Footer			
(4) Expand Continuous Orders - This is a site			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
parameter to enable continuous orders to be expanded or not on the chart copy			
(5) Print Chart Copy When - This parameter determines at which point the chart copy of orders will print.			
(6) Prompt for Chart Copy			
(7) Use the WC – Work Copy Parameters options to review entries. There can only be one Work copy set per facility.			
(a) Work Copy Format			
(b) Work Copy Header			
(c) Work Copy Footer			
(d) Prompt for Work Copy			
(8) Use the SC – Service Copy Parameters option to review entries. There can only be one set per Package.			
(a) Package -			
(b) Service Copy Format			
(c) Service Copy Header			
(d) Service Copy Footer			
(e) Service Copy Default Device			This can only be set for one of the divisions - If other divisions need a service copy, then the individual ordering locations for the 2nd division need to set this parameter at the location level.
2) Use the RE – Requisition/Label Parameters option to review entries. There can only be one setup per Package.			
a) Ward Requisition Format			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
(1) Ward Requisition Header			
(2) Ward Requisition Footer			
(3) Ward Label Format			
(4) Prompt for Requisitions			
(5) Prompt for Labels			
3) Use the UM – Summary Report Parameters There can only be one set up per Site.			
a) Chart Copy Summary Sort Forward - Enter YES to have the Chart Copy Summaries sort by forward date/time.			
(1) Work Copy Summary Sort Forward			
(2) Print 'NO ORDERS' on summary - A value of YES in this parameter will print a page showing 'No Orders' on an order summary if no orders exists for the patient			
(3) Condensed Order Summary - The report will be continuous from one patient to the next, printing multiple patients on a page, if there is room.			
(4) Print ALL ORDERS on Chart Summary - A value of 0 will only print orders that originally printed a chart copy. This is the default value for this parameter.			
4) Use the HO – Print Parameters for Hospital option to review the entries.			
(1) Initials on Summary - This parameter allows the initials of the person who entered the order to be displayed on the order summary reports.			
(2) Requisition Sort Field (this will be per			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
package)			
(3)　　　Label Sort Field (this will be per package)			
(4)　　　Order Summary Sort Forward - Enter YES to have the Order Summaries sort by forward date/time.			
(5)　　　Prompt for Chart Copy			
(6)　　　Prompt for Work Copy			
(7)　　　Prompt for Requisitions			
(8)　　　Prompt for Labels			
b)　Parameters set for the Location level - LO -　Print Parameters can be set at each hospital location			
(1)　　　Chart Copy Print Device			
(2)　　　Prompt for Chart Copy			Prompts can be set for 0, no prompts; 1 to prompt for chart copy and ask which printer should be used; 2 to prompt for chart copy and automatically print to the printer defined in the CHART COPY PRINT DEVICE field. OR; * don't print.
(3)　　　Work Copy Print Device			
(4)　　　Prompt for Work Copy			
(5)　　　Requisition Print Device			
(6)　　　Prompt for Requisitions			
(7)　　　Label Print Device			
(8)　　　Prompt for Labels			
(9)　　　Daily Order Summary Device			
(10)　　Service Copy Default Device			
(11)　　Print Chart Copy Summary			
(12)　　Print Daily Order Summary			

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D. NA **Print Parameters for Nature of Order** – This file has undergone data standardization and cannot be modified except for the following fields.
1) Print Chart Copy - This field determines if this entry/action should generate a Chart copy.
   a) Print Daily Summary - This field determines if this entry/action should appear on the Daily Order Summary.
   b) Print Work Copy - This field determines if this entry/action should generate a Work Copy.
   c) Include in Active Orders - This determines if orders dc'd with this nature are included in the Active Orders list.			

E. **Default ADD ORDER MENU** – Create a system wide default add order menu using the options on the CPRS Configuration Menu (Clin Coord)			CPRS doesn't import a working *Add Orders* menu (the exported one is an example with placeholders - the quick orders don't work).
2. **TEAM MANAGEMENT –** Patient List Mgmt Menu Option: Team List Mgmt Menu CR Create/Add to Team List EX Examine/Print Existing List(s) PR Remove Providers from a List PT Remove Patients from a List DE Delete Existing List(s) AL Remove Autolinks RE Rename Existing List(s) *******			
3. **ALERTS/NOTIFICATIONS** Use the options on the Notification Management Menu to control the way notification work for individual,			Notifications are exported as disabled.

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department/services or the entire medical center.			
A. Enable/Disable Notifications - Review which system/division-wide notifications should be enabled/disabled. . If you want to enable for all divisions at once, select "System". For each division or the system, enter "Enable" at the prompt.			
B. Set Deletion Parameters for Notifications – Review which deletion parameters should be set for certain alerts/notifications. This parameter determines how the notification will be deleted at the site depending on the code entered.			Deletions parameters can be set at the Division, Package or System Level
C. Set Default Recipient(s) for Notifications – If the particular notification is set to YES the users/teams will always receive the notification, regardless of patient.			Can be set for User or Team
D. Set Default Recipient(s) Device for Notification – If the particular notification is set to YES, the device will always receive the notification, regardless of patient.			Can be set for Division or System
E. Set Provider Recipients for Notifications - lets you set any one or combination of a set of codes indicating default [provider] recipients of a notification by their title or relationship to the patient.			Can be set for Division, System or Package
F. Flag Orderable Item(s) to Send Notifications – Three options: 1) Flag INPATIENT orders/results/expiring orders. 2) Flag OUTPATIENT orders/results/expiring orders. 4. Flag Lab tests for Threshold Exceeded alerts.			
A. Archive (delete) after \<x\> Days - Enter the number of days to archive this notification before deletion in the Alert Tracking file. If not indicated, the default period of 30 days is used. This value is passed to the Kernel Alert B. Utility where the actual archiving and deletion of			Can be set for Division, System or Package

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alerts/notifications occurs.			

1) Forward Notifications ... Hold Days before Forward to Supervisor may be set for the following:
   a) Forward Unprocessed Notification to Supervisor
   b) Forward Unprocessed Notification to Surrogates
   c) Forward Unprocessed Notification to Bkup Reviewer
			Can be set for Division, System or Package

C. Set Delays for Unverified Orders ... This allows you to set up parameters for delaying unverified orders alert triggers. 1) Set Delay for All Unverified Orders 2) Set Delay for Unverified Medication Orders			Can be set for Division, System or Package
D. Send Flagged Orders Bulletin - "Yes" indicates a MailMan bulletin will be sent to the order's Current Provider (usually the Ordering Provider).			Can be set for User, Service, Division, System or Package
E. Enable or Disable Notification System - Parameter determines if any notification processing will occur.			Can be set for Division, System or Package
5. **DC Reasons** – these should be reviewed. This is accomplished using the Edit DC Reason under the Clinical Coordinators Menu.			
A. **Order Check** – Review of Order Checking will need to be done.			
1) Enable/Disable – Order checks can be set at different levels. The order of precedence when determining if order checking should be performed is user, patient location, service, and division. If nothing exists for the Division, the value released with CPRS is used.			
2) System parameters will need to be reviewed using the Order Checking Management Menu options. The various settings are multidivisional. They are:			

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a) CT Scanner Height Limit b) CT Scanner Weight Limit c) MRI Scanner Height Limit d) MRI Scanner Weight Limit e) Orderable Item Duplicate Order Range f) Lab Duplicate Order Range g) Radiology Duplicate Order Range h) Set Number of Medications for Polypharmacy i) Set Creatinine Date Range for Glucophage-Lab Rslts j) Set Order Checks to be Uneditable By Users k) Set Creatinine Date Range for Contrst Media Orders			
3) Set Clinical Danger Level for an Order Check – Enter the code indicating the clinical danger level of an order check.			Order checks come with a pre-set danger level as given in the table in the CPRS V1.0 Set-up Guide
4) Enable or Disable Order Checking System – This option lets you determine if any order checking processing occurs in the Entire Order Checking System.			Can be set for Division or System
5) Enable or Disable Debug Message Logging – The order checking system can keep a log of special messages designed to assist in debugging Order Checking Problems			
6) Edit Site Local Terms - Link lab, radiology, and DNR terms used in the CPRS Expert System to local terms. Because some terms used for ordering (lab test names, for example) vary from site to site, the order checking system has created a file of standard terms related to the order checks used in CPRS. Sites must map the locally used term in the Orderable Items file (#124) or			

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the Lab Test file (#60) to one in the order check file.			
6. Set Unsigned Orders View on Exit - This determines which unsigned orders view that holders of the ORES key will see when exiting a patient's chart; the Package default is to show My Unsigned Orders.			Can be set for User, Service, Division, System, or Package
7. CPRS GUI Parameters			
A. Background/Foreground Retrieval - ORWOR COVER RETRIEVAL – allows you to set whether the coversheet list boxes will load in the background or foreground when a user opens a patient in CPRS.			
8. **GUI coversheet parameters** can be setup by system/division on down. These will need to be reviewed. Editing can be done using the GUI Coversheet Display Parameters found under the GUI Parameters Menu. A. Inpatient Lab Number of Days to Display - The number of days backwards in time to search for lab orders/results. Default is 2 days B. Outpatient Lab Number of Days to Display - Default is 30 days C. Enc Appt Range Start Offset - Returns the relative number of days before Today to begin listing appointments D. Enc Appt Range Stop Offset: E. Future Days Limit For PCE Selection: Number of days from Today when warning is given to user upon selection of a future appointment for Encounters. F. CS Visit Search Start: Returns the relative date to start listing visits for a patient on the Cover Sheet. G. CS Visit Search Stop: H. For Clinical Reminders for Search –			Can be set for System, Division, Service, Location or User

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1) For List of coversheet reports - This parameter allows a custom view of the Cover sheet in the CPRS GUI. I. For Cover Sheet Retrieval Mode -			
9. **Sequence the Health Summaries Types** that are to be displayed on the Report Screen within CPRS using the GUI Health Summary Type option.			Can be set for User or System
10. **GUI Tool Menu Items** will need to be created. This option lets you add items that will available to the user via the CPRS GUI tools menu. This will have to be coordinated with IRM Service.			Can be set for User, Location, Service, Division, System or Package **Event capture requires exact spelling of command:** **Event Capture Interface…example** **Event Capture &Interface="\\Vhawrjrdc\apps \EC GUI\ECS GUI.exe"**

11. **GUI Parameters –** Miscellaneous - Miscellaneous Parameters may be set for User, Division, System or Package
A.) Initial Tab when CPRS Starts - This parameter identifies the tab that should be initially displayed when CPRS first starts
  1) Use Last Selected Tab on Patient Change - When this parameter is set to yes, CPRS will open to the last selected tab whenever changing patients.
  2) Interval for Autosave of Notes - This parameter determines how many seconds should elapse between each auto-save of a note that is being edited in the GUI
  3) Verify Default Title - If this parameter is set to YES, the window that allows the user to change a note title			

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will appear whenever the user starts to enter a new note, even if they have a default title.			
12. **GUI Report Parameters Option** - This parameter allows a custom list of reports, with sequencing, on the Reports tab.			Can be Set for User or System
A. Non-VA Meds Statement/Reason – values exported with package: B. Non-VA medication not recommended by VA provider. C. Non-VA medication recommended by VA provider. D. Patient wants to buy from Non-VA pharmacy. E. Medication prescribed by Non-VA provider.			Can be set for Division, System or Package
F. GUI Expired Orders Search Hours - Number of hours back in time to search for expired orders.			Can be set for System or Package
G. GUI Remove Button Enabled & GUI Remove Button Enabled for Non-OR Alerts – Allows CAC to review notifications/alerts and identify which alerts can be deleted without processing.			
H. GUI Mark Allergy Entered in Error - This parameter will control whether or not a user has access to the entered in error functionality available on the cover sheet in CPRS GUI.			Can be set for User, Class, Division or System
13. **GUI Graphing** – CPRS GUI V.26 enabled Graphing functionality. Review the CPRS GUI Technical Manual for details on enabling and disabling data sources. A. CPRS graphing provides users with the ability to set and save display options and create and save predefined views. (Public views and settings are available to all of the users at your site, but only authorized users can create or alter these views and settings.) If your site is going to be using these you may want to create a list of public reports for your users to select from.			Can be set for User, System or Package.
1) **Remote Data View Configuration** – Remote views			Review the Technical Manual for

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allows you to review patient data that is collected at other facilities. Nationally exported Health Summaries are usually used for this. If local HS are used you need to make sure you use HS components that are also located at the retrieval site.			setup.
2) **Clinical Indicators Data Capture** Parameter – Consider this carefully!!! – CPRS controls the entry of Clinical Indicators Data Capture (CIDC) information using two switches. When the switches are turned ON – the providers will enter diagnoses for orders. a) OR BDC MASTER SWITCH—turns CIDC functionality on at the system level. Will not prompt the provider unless the next switch is also turned ON. (1) OR BDC PROVIDER SWITCH – turned on and assigned to each individual provider			
3) **TIU Templates in GUI**. Edit Shared templates and Create new templates are enabled for members of the Clinical Coordinators ASU User Class. a) Reminder dialogs can be linked to shared templates so that a reminder dialog can be selected from the templates drawer. This allows templates to create orders, enter encounter data, vitals and do everything else that a reminder dialog can do. b) Restricting allowed Patient Data Objects within Templates – The TIU Template Personal Objects Parameter controls the patient data objects available in the template editor for users that cannot create shared templates. c) Template Fields – access is controlled by the parameter TIU FIELD EDITOR CLASSES – This multi-valued parameter contains a list of ASU user			

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classes and can be set at the User, Service, Division or System level.			
14. **CPRS Reminder Configuration** – A. CPRS Lookup Categories - Use this option to enter categories that will be displayed in the reminders available tree list. B. Reminder GUI Resolution Active – Use this option to let users process reminders through the CPRS Notes or Consults tabs C. Mental Health Dialogs Active – Use this option to turn this parameter on for the whole system to enable reminder resolution using mental health dialogs D. Progress Note Headers – Use this option to create a special header to distinguish the GUI resolution text generated for PN's from other PN's E. New Reminder Parameters – Use this option to activate cover sheet reminder retrieval from new set of parameters.			
15. **CONSULT TAB** – GMRC CONSULT LIST DAYS This parameter controls the number of days TIU searches for consult that can be associated with a TIU note.			The package default is set for 365 days.
16. CPRS Configuration (IRM)			
A. ORMTIME: background processor that is used in conjunction with the ORTASK routines to manage background jobs for order processing. They are intended for IRMS only.			Should be set to automatically run
B. DGPM Movement Event: Review and assign sequence numbers to protocols. All the package protocols in the ITEM field of the **DGPM Movement Events** Protocol of the PROTOCOL file (#101) must be sequenced before the OR protocols.			Most of the necessary movement event protocols are automatically assigned during the CPRS installation.
C. ORWOR TIMEOUT CHART **- Allows** CPRS GUI to have its			

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own timeout independent of DTIME. This is the number of seconds CPRS GUI should remain idle before timing out.			
D. ORWOR TIMEOUT COUNTDOWN – is used to specify how long the warning window should appear before a user times out.			
E. ORWOR BROADCAST MESSAGES - CPRS broadcasts messages to notify other applications about events within CPRS, such as when a patient changes.			
F. ORWOR DISABLE WEB ACCESS - When this parameter is set to yes, web links in the CPRS GUI will be disabled or hidden.			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
PROBLEM LIST			
1. Setting up Problem List Pick Lists			
A. To create, maintain, customize and assign problem list selection lists for users use the GMPL MGT MENU option, "Create Problem Selection Lists	Build Problem Selection Lists." 1) There are several site parameters to set for problem list package: a) VERIFY TRANSCRIBED PROBLEMS - This is a toggle which determines whether the PL application will flag entries made by a non-clinical user, and allow for subsequent confirmation of the entry by a clinician. b) PROMPT FOR CHART COPY - This is a toggle which determines whether the PL application will prompt the user to print a new chartable copy of the patient's list prompt the user to print a new chartable copy of the patient's list patient's list has been modified. c) USE CLINICAL LEXICON - This is a toggle which determines whether the PL application will allow the user to search the Clinical Lexicon when adding or editing a problem d) DISPLAY ORDER - This flag allows each site to control how the problem list is displayed, whether chronologically or reverse-chronologically by date recorded. e) SCREEN DUPLICATE ENTRIES - If YES is entered in this field duplicate problems (those having the same ICD9 code) will NOT be added to the problem			

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list.			
2. **MEDS TAB** –you can use the ORWDX NEW MED parameter to display other types of menus. IE – Insert your add order screen here. A. PSJ CSD parameter allows you to define the information used to calculate the stop date for inpatient medications for outpatients.			
3. ORDERS TAB -			
A. Sequence of Display Groups is controlled by the parameter - ORWOR CATEGORY SEQUENCE.			Can only be set for the System level.

1) ORWOR DISABLE ORDERING - can be used to prevent writing new orders and taking action on existing orders.
   2) ORWOR ENABLE VERIFY –
   3) ORWOR DISABLE HOLD ORDERS			

B. E. Inpatient (Unit Dose) Orders for Outpatients – IMO Project is designed to enable a CPRS user to order a unit dose medication that is dispensed by inpatient pharmacy and administered to an outpatient clinic setting.			If your site decides to implement this functionality, refer to the CPRS technical manual for setup and use.
C. ORES - This key is given to users that are authorized to write orders in the chart. DO NOT give users both the ORES key and the ORELSE key.			
D. ORELSE - This key is given to users that are authorized to release doctor's orders to an ancillary service for action.			
E. OREMAS - This is the key given to MAS Ward Clerks.			
F. You will need to create a write orders list to place your add orders menu on - User the parameter - ORWDX			Can be set for User, Location, Service, Division, or System

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WRITE ORDERS LIST – This list box can contain order menus, order sets, quick orders, or any order dialog.			
G. **Event Delayed Orders** – Creating a release event allows CPRS users to write event delayed orders that are not executed until the release event occurs.			If you wish to use this functionality, see the CPRS Technical Manual for instructions.
H. **Auto DC Orders** – A CAC can set up rules that will automatically dc an order when a specific event occurs.			
I. Creating a List of Common Used Release Events - Release events defined by this parameter will appear first in the list box when the user is writing delayed orders.			
J. Default release event			
K. Manual release controlled by - This parameter defines how access to the manual release action is controlled.			
L. Set manual release parameter - This parameter will control the ability to use the release delayed orders action if the OREVNT MANUAL RELEASE CONTROL parameter is set to Parameter or Both (Parameter and Keys).			
M. Exclude display groups from copy - If the "copy active orders" field of a release event is set to YES then any orders that belong to the display groups listed in this parameter will NOT be presented in the list of orders to copy.			