Health Summary Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
HEALTH SUMMARY, version 2.7 1. The Health Summary package integrates clinical data from the VISTA ancillary packages into patient health summaries which can be viewed online in LM Vista Health Summary or CPRS Reports Tab or printed as reports			
A. GMTS is the namespace assigned to Health Summary. All Health Summary V. 2.7 routines, options, bulletins, mail groups, and security keys use this namespace.			The Health Summary Package originally was a package that allowed individual printed summaries for a patient, based on the ancillary package components (lab, pharmacy, MAS movement etc). Current use is primarily with the Reports Tab of CPRS, but may still be used for printed reports, utilizing local health Summary Types, Ad Hoc components and Nationally standardized Remote Data Views
B. Security Keys Needed			
GMTSMGR			Provides master edit access to all other health summary types.
GMTS VIEW ONLY		t	In CPRS, the reports tab will still allow a user to print even if they have this 'restrictive key'
C. Options Needed			
Health Summary Overall Menu [GMTS MANAGER]			Give access to 'all' menus
Health Summary Enhanced Menu [GMTS			With the use of CPRS this option

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ENHANCED USER]			has limited use, unless the user is using the LM Health Summary options
Health Summary Menu [GMTS USER]			No special menu needed for CPRS Reports tab.
Health Summary Coordinator's Menu [GMTS COORDINATOR] Print Health Summary Menu ... Build Health Summary Type Menu.. Set-up Batch Print Locations List Batch Health Summary Locations CPRS Reports Tab 'Health Summary Types List' Menu ...			Options #2 & 5 are the primary options used by the CAC currently. The setting up of *Batch Printing* is no longer a primary activity but may be used as a backup method.
2. Health Summary Maintenance Menu [GMTS IRM/ADPAC MAINT MENU] Disable/Enable Health Summary Component Create/Modify Health Summary Components Edit Ad Hoc Health Summary Type Rebuild Ad Hoc Health Summary Type Re-sequence a Health Summary Type Create/Modify Health Summary Type Edit Health Summary Site Parameters Health Summary Objects Menu ... CPRS Reports Tab 'Health Summary Types List' Menu ... CPRS Health Summary Display/Edit Site Defaults ...			The same options as the Coordinators Options with additional option that allow for creating, enabling, disabling, sequencing and editing of site parameters.
3. Setup Requirements			
Review Appendix A of HSUM_IG. Identify which components that will be used at the facility. A. Use the option **"Disable/Enable Health Summary**			Components are used to by themselves as an Ad-Hoc report in both LM HS Vista and CPRS Notes Tab or used to build Health

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Component [GMTS IRM/ADPAC ENABLE/DISABLE] to enable/disable			Summary Types that contain multiple number of components
B. Use the option **Create/Modify Health Summary Components** [GMTS IRM/ADPAC COMP EDIT] 1. to create/modify Health Summary components, either by duplication and renaming of existing components or by entering all appropriate fields for a component to be used onsite.			
C. Use the option **Edit Ad Hoc Health Summary Type** [GMTS IRM/ADPAC ADHOC EDIT] to edit Ad Hoc Health Summary Types by Entering/editing a component's default parameters (Time and Occurrence limits, Selection Items, Hospital Location Displayed, ICD Text Displayed, Provider Narrative Displayed, Header names, and whether to print component headers if no data is available), or delete components of the Ad Hoc Health Summary Type.			This is actually the option that allows the editing of the HS components and the fields that will be used when the component is used as an Ad-Hoc report or when included in a HS Type.
4. **Rebuild Ad Hoc Health Summary Type**, this option reloads the Ad Hoc Health Summary Type with ALL (previously defined) components, including any defined by the site, and, optionally, all DISABLED components sequenced alphabetically by name. Disabled components will not be displayed, but when they are re-enabled will automatically show up in the Ad Hoc Health Summary if they are included in the rebuild.			
5. Use the **Resequence a Health Summary Type** options to resequence the components of a given Health Summary Type from 5, in increments of 5 (e.g., 5, 10, 15, 20,...,5*n* where *n* is the total number of components).			Using the sequencing allow the CAC to add in new components without having to completely rebuilding the whole Health Summary
6. The **Create/Modify Health Summary Type** option will			With current use of HS, the CAC

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allow the user to create a new or modify an existing health summary type. A. New types created by this option automatically define the type's owner as the creator, unless the creator holds the GMTSMGR security key. If the creator has this key, the GMTSMGR holder may designate anyone as the owner.			will typically be the owner.
7. Use the **Health Summary Site Parameter** to edit four Health Summary parameters to local specifications: A. PROMPT FOR ACTION PROFILE; editing this parameter to YES allows users to be prompted for printing a patient's Outpatient Pharmacy Action Profile in tandem with a health summary. 1. INCLUDE BAR CODE ON ACTION PROFILES; editing this parameter to YES allow bar codes to be printed with Action Profiles. 2. INCLUDE COMMENTS ON LABS; editing this parameter to YES cause comments to be printed in the Chemistry and Hematology, the Lab Test Selected, and the Lab Cumulative components. 3. SPOOL DEVICE; specify spool device name to which Health Summary output can be directed during a PDX request			a. The prompt for action profile is not utilized as much in the way HS is used currently b. This may be significant, many sites may have results put in "as comments" c. & d. are not typically in use with current systems
8. Use **Health Summary Object Menu** option to access utilities to add/edit a Health Summary Object, display the characteristics of a Health Summary Object, test a Health Summary Object Export/import a Health Summary Object.			To create the TIU/Health Summary Objects, see the TIU Options. Using the HS Objects allow TIU to utilize any HS component and

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			turn it into a data gathering object for TIU and other text generating options, like 'default reason for request"
9. Use the options in the **CPRS Reports Tab Health Summary Types List Menu** to select the Health Summary Types to list on the Reports Tab, arrange the order of these Health Summaries on the list to view the user s preferences.			** Primary option used for CPRS setup of Health Summaries – minus the site parameters seen in site defaults
10. Use the **CPRS Health Summary Display/Edit Site Defaults** GMTS GUI SITE DEFAULTS to display the site defaults, select the Health Summary Types to list on the Reports Tab, edit the method of building the list (append/overwrite), edit allowable entities for the list (i.e., User, System, Division, etc.), re-sequence the allowable entities in the order they should be appear on the list.			**Same as above option with a few additional site parameter