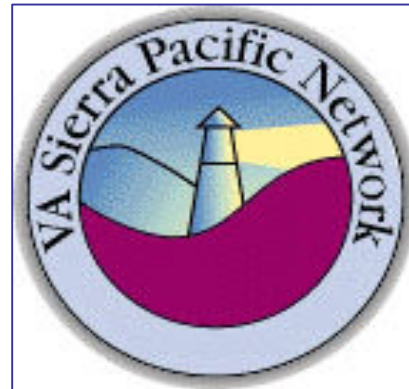


VA Sierra Pacific Network VISN 21



Appointment Reminder Card Implementation Manual Version 1.1 Part 1 of 4

March 2010



VA Capitolia OPC
1350 N. 41st St., Suite 102 (08CA)
Capitolia, CA 95010-3906

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123 Jay Street
Smithville CA 12345-1230

Appointment Reminder Card Implementation Manual

This manual provides information for the successful implementation of the Appointment Reminder Card Program. This program is designed to convert the existing appointment letters generated by the VISTA Scheduling Package to a more user friendly reminder card that is easy to understand and provides for an improved patient experience with the VA health care System.

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Part 2.

Appointment Card Templates (currently in use)

Part 3.

Crosswalk

Part 4.

Vista Menus

The image shows a sample of the Appointment Reminder Card. It features the VA logo and the text 'Department of Veterans Affairs' and 'VA Palo Alto Health Care System'. The card provides appointment details: Date: Wednesday, September 27, 2006; Time: 2:45 p.m.; Clinic: Primary Care; Provider: James Byrd, MD; Location: VA Capitolia OPC. It also includes instructions for patients, such as 'Follow these steps BEFORE your appointment' and 'Have a question? Call (831) 464-5519'. A section for 'Try our new Pharmacy Prescription Refill Hotline' is also present.

Background / Project Overview

This project is designed to convert the existing appointment letters generated from the VISTA Scheduling System to a post card sized Appointment Reminder Card that is user friendly, easy to understand, provides a professional appearance, and reduces cost (production and postage cost). The project began years ago as a local initiative by Northern California Health Care System (NCHCS) and transformed to a VISN wide project when it was discovered the return on investment (ROI) analyses did not support a single facility investing in the equipment resources necessary to generate the postage sized appointment cards. With the volume of the entire VISN, the ROI demonstrated significant savings with the reduction of postage, printing, and FTEE cost.

The design of the Appointment Reminder Cards was accomplished by a group of VA staff working along side a design team under contract with Xerox. The workgroup met with multiple face-to-face design meetings, and follow-up conference calls and email reviews. Included on the VA Design Team were representatives from all VISN 21 facilities and staff from VISN 18, with a wide variety of backgrounds. The team identified 15 types / categories of communication that would replace the over 300 variation of appointment letters used by VISN 21 facilities.

IMPLEMENTATION - STEP-BY-STEP

Pre-Implementation – Prepare Early:

1. Appoint a Facility Project/Program Manager

Each facility should have a Program/ Project Manager and IT representative to oversee the implementation process and be responsible for working with the RRC (Regional Reproduction Center) to work through issues and provide feedback. The V21 Appointment Card Program Team Members will work “hand in hand” with you throughout your process and beyond. You may also contact and work with others at facilities that have already activated the Appointment Card Program for their locations.

2. Establish a Facility Implementation Workgroup

The facility Workgroup should consist of representatives from IRM (Programmer), Business Office (MAS representative), Clinical Admin Support (for clinical input on appointment cards), Logistics (Mailroom), Patient Advocate, Public Relations. The Workgroup will be responsible for developing a communication plan, local implementation plan, develop local policy or procedures relating to the Appointment Reminder Cards (ARC).

3. Clean Address Data in VISTA

Ensure the address data in your active patient records meets the VA guidelines. Accurate patient address information is extremely important! Everyone benefits as result of accurate patient addresses by being able to better communicate with patients. VHA Directive 2009-021 “Data Entry Requirements for Administrative Data,” references United States Postal Service Publication 28 “Postal Addressing Standards” and outlines specific guidance for entering patient demographic information into VISTA database. Use of standardized address information enhances the processing and delivery of mail, reduces undeliverable-as-addressed mail, and provides cost reduction through efficiency.

4. Gather Facility / Site Data

Using the enclosed data sheet (Excel Spreadsheet), gather the data for all sites within your facility. These data elements include: Site/CBOC Name and Address; Station Number, Parent Facility Name and Address; Site Phone numbers (Information and Appointment Cancellation), business hours, website, etc. This data is used to set up the specific templates in the VIPP System that will print on your Patient Appointment Cards. **This data should be submitted to the RRC No Later Than 10 days prior to the facility implementation date.**

5. Generate Facility Maps and Direction Pages

Each Patient Appointment Card will include a map and directions to the specific site / CBOC. This is set up as a pdf image that resides on the VIPP System and prints on all Patient Appointment Cards associated with that specific site / CBOC. Facilities are to use the attached format in MS PowerPoint, which is converted into a pdf file after it is submitted to the RRC. **Map pages must be submitted as a MS PowerPoint No Later Than 10 days prior to the scheduled implementation date.** If assistance is required to produce maps, here is a recommended source:

Chris Bogard-Reynolds
Forte Information Resources
222 Milwaukee Street, Suite 403
Denver, CO 80206
303 321 3888
303 394 4757 (fax)
cbogard@forteinformation.com
www.forteinformation.com

6. Load Class III VISTA Software

The patch must be loaded to add the variable data fields that provide data to print on the ARC's. Data fields include: plain language clinic name; Phone numbers, Provider Name; Blue Box information (programmable information for each clinic); etc. This data accompanies the specific appointment data from the VISTA Scheduler package (patient name, address, appoint time, clinic name, etc). All data is transmitted as a single concatenated data string to the RRC Server.

7. Populate Data Fields in Web Based Crosswalk

Using the Appointment Card Data Sheet (Excel Spreadsheet) as a guide, you must use the Web Based Crosswalk to enter the data for each clinic. The Crosswalk has been designed to reduce the amount of time necessary to enter the data, with the use of Templates and Boiler Plates. This eliminates some of the redundant data entry and has proven to be very effective in reducing the time required to set up the clinics in the Crosswalk.

8. Your Facility's Activation/"Go Live"

Once the Crosswalk is populated, and your Facility Data Mapping Sheet and your Map/Driving Directions Pages for your sites has been submitted to the RRC Program Manager and loaded into VIPP, you will be assisted in completing a one time transmission of data to the RRC Server for a test printing. These printed cards will be shipped to you for your review. This enables the facility staff to make any changes / updates to the Crosswalk and allows them to perform Quality Check before any Appointment Cards are mailed to our Veteran Patients.

Once you are finished with your review and necessary/desired changes, your IT Lead will set up the nightly transmission of your data to the RRC for printing and mailing cards to your patients on the next business day.

DO NOT FORGET TO NOTIFY THE V21 REGIONAL REPRODUCTION CENTER PROGRAM MANAGER WHEN YOU ARE READY TO START PRINTING YOUR CARDS.

Frequently Asked Questions

A. How do I activate / deactivate the printing of appointment cards?

After you have set up the clinics in the web based Crosswalk, cards will only print when you add text in the Blue Box. If there is not text in the Blue Box, the appointment cards for that specific clinic will not print. This allows a way to effectively turn on/off the appointment cards by clinic, and provides a QA check to make sure no cards are generated without some text in the Blue Box.

B. How far in advance will the appointment cards print prior to a scheduled appointment?

The default setting for the printing of appointment cards is 14 calendar days. **In the event you schedule an appointment for a patient within the 14 calendar day window, this system will not send a card to the patient.** You may still use the VISTA Scheduling package to generate an appointment letter at a local printer. The default time setting may be changed by the Facility IT Representative in the Xerox Post Card Parameter File

C. What happens if our facility has not populated either the “Institution” or “Division” data fields in the VISTA System?

The VISTA patch has been set up to first look in the “Division” field in VISTA, and if there is no data present, the system will then look in the “institution” data field. This is the way the correct card image in the VIPP system is married up with the Appointment Card data coming from the VISTA System. The established image and data located in the VIPP System will then print based on the Site Number located in these fields (i.e. Station number and suffix – “612AG”). Without this critical data, there will be no way for the VIPP System to know which data and image to print on the Appointment Card.

D. How can I add a designated internal VA Routing Code to the return address on the Appointment Card?

If you would like an internal VA Routing Code (i.e. 138) to be included with the return address, in case a card is returned to the VA facility, you may add a VA Routing Code to the appropriate data field in the web based Crosswalk Tool.

E. How much text can I have in the Blue Box?

The system is set up to allow 9 lines of text, with a maximum of 63 characters per line. **The first line of text in the Blue Box will ALWAYS be in bold print.** Again, there must be text in the Blue Box for any Appointment Cards to print for that specific clinic.

F. How do I change the text message in the Facility Message Box?

The box was established to allow a facility to include an appropriate seasonal or special message on all Appointment Cards printed for that facility. Access the “Xerox Update Universal Box on VIPP” VistA option. You are limited to 253 characters/spaces. No special formatting is required.

G. If I deactivate a clinic in VISTA, what happens to the data in the Crosswalk?

Once you have entered data in the Cross Walk for a clinic, the data remains, even if the “clinic” is deactivate in VISTA. Due to this, it is important to re-visit the data in the Crosswalk at any time you re-activate a Clinic in VISTA to make sure the Crosswalk data is still relevant to the clinic.

H. Can I copy and paste using MS Word when setting up Boilerplates and/or Templates?

No. When copying text from MS Word, it incorporates hidden control characters that cause formatting problems within the VIPP System. **Do not copy and paste text from a MS Word document into the Blue Box text filed in the Crosswalk.**

I. Do I need to put hard carriage returns at the end of each line of text in the Blue Box?

Yes. In order for the text to format correctly on the Appointment Card, you must add a hard carriage return at the end of each line of text in the Crosswalk for the Blue Box.

GUIDELINES FOR PREPARING MAP AND DIRECTION PAGES


5.3 inches

3.5 inches

How to find us.
From Interstate 80 E: Take the Watt Avenue exit. Turn Left on Watt Ave. Take right turn on Palm Ave (enter McClellan Park). Turn left on Dudley Ave.

McClellan Outpatient Clinic
5342 Dudley Blvd
Sacramento, CA 95652

Phone: (916) 561-7400
Hours: Monday – Friday 8:00 a.m. to 4:30 p.m.
Web: www1.va.gov/directory/guide/facility



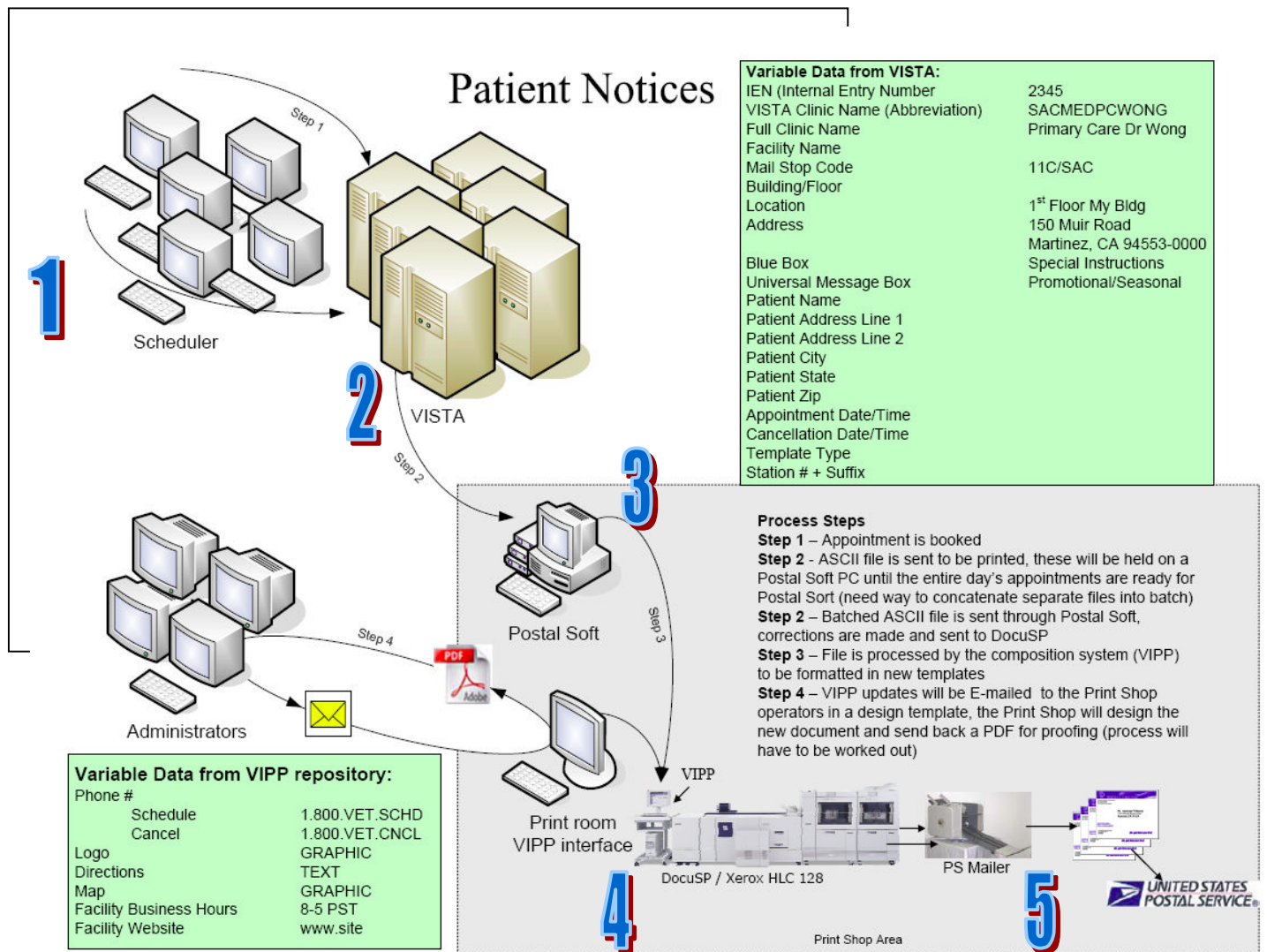
Use MS Powerpoint file to generate your map pages. **DO NOT CHANGE THE SIZE OF THE DOCUMENT. IT MUST BE 3.5 X 5.3 INCHS TO FIT INTO THE TEMPLATE**

Once you have forwarded your map pages to the RRC, they will be converted to a PDF file for use by the VIPP System.

Recommended Vendor to generate facility / site maps:

Chris Bogard-Reynolds
Forte Information Resources
222 Milwaukee Street, Suite 403
Denver, CO 80206
303 321 3888
303 394 4757 (fax)
cbogard@forteinformation.com
www.forteinformation.com

Data Flow Diagram



1

The Health Benefits Advisor (HBA) enters an appointment in the VA Scheduling Package.

2

The VISTA System, with the Appointment Card patch installed, holds all of the variable data (such as plain language clinic name, location, patient name, appointment time, location, etc). With the patch installed, it generates a data string (ASCII) for each appointment generated and batches them together (concatenates the multiple data string into a single data string). At a designated time, VISTA sends the batched data string to the Postal Soft server on the VA Network.

3

The Postal Soft server takes the batched data string from VISTA and analyses the addresses within the data. The software compares the address to the USPS National Change of Address data base and the national address database to validate the address is valid. The Postal Soft software then arranges the addresses and variable VISTA data into sequence by Zip Code to facilitate reduced postage rates. It also identifies any addresses that are not valid and generates a comprehensive report. The specific cause of an address error can be identified by the error message code generated. Undeliverable cards are returned by the U.S. Post Office to the sending facility. It is important that each facility verify the mailing address for each veteran on a regular basis and enter the address into VistA in compliance with VHA DIRECTIVE 2009-021.

4

The VIPP System (Variable Data Intelligent PostScript Printware) takes the data from the VISTA system, which has been processed by the Postal Soft server and matches the data up with pre-defined print template located in the VIPP server associated with the card type and produces the Patient Appointment Card. All cards are affixed with the U.S. Postal Service Bulk Mail Permit number.

5

Once the Patient Appointment Cards are printed (two up), they are folded, cut, and sealed using a PS600 Infoseal PS folder/sealer. The cards are then segregated into mail bins, pre-sorted by Zip Code, and sent to the Post Office for delivery.

Data Dictionary

Station/Suffix	Vista	Alphanumeric	10	3-Station(N) 7-Suffix(AN)
Suffix	Vista	Alphanumeric	7	Naming Convention
IBN	Vista	Numeric	10	
Vista Clinic Name	Vista	Alphanumeric	30	Not changeable
Full Clinic Name	Crosswalk	Alphanumeric	45	
Facility Mailstop Code	Crosswalk	Alphanumeric	10	
Facility Location (Campus)	Crosswalk	Alphanumeric	30	
Facility Building/Floor	Crosswalk	Alphanumeric	30	
Facility Address Line 1	Vista	Alphanumeric	30	
Facility Address Line 2	Vista	Alphanumeric		
Facility Address Line 3	Vista	Alphanumeric		State & Zip code
Blue Box	Crosswalk	Alphanumeric	9 lines 63 characters	Note of billing text.
Tray Number	Postal Soft	Numeric	5	
Optional Endorsement Line	Postal Soft	Numeric	28	
Barcode Number	Postal Soft	Numeric	12	
Error Code Field	Postal Soft	Alphanumeric	6	Used to correct bad address
Patient Name	Vista	Alphanumeric	30	
Patient Address 1	Vista	Alphanumeric	30	
Patient Address 2	Vista	Alphanumeric	30	
Patient City	Vista	Alphanumeric	30	
Patient State	Vista	Alpha	2	
Patient Zip	Vista	Alphanumeric	10	
Appointment Day of Week/ Date	Vista	Alpha	30	DAYMONTHDD, YYYY
Appointment Time	Vista	Alphanumeric	8	HHMMAM
Cancellation Day of Week/ Date	Vista	Alphanumeric	30	DAYMONTHDD, YYYY
Cancellation Time	Vista	Alpha	8	HHMMAM
Template Type	Vista	Numeric	2	Value 1-16 only (Per number)
General Facility Number	Crosswalk	Numeric	14	
Logo	VFP	tiff or jpg		Trigger by Station#
Map*	VFP	tiff or jpg		Trigger by Station/Suffix
Directions*	VFP	Alphanumeric		
Facility Business Hour*	VFP	Alphanumeric	2 lines	Trigger by Station/Suffix
Facility Website*	VFP	Alphanumeric		Trigger by Station/Suffix
Facility Name	VFP	Alphanumeric	45	Trigger by Station/Suffix
Cancellation Phone Number	VFP	Numeric	14	Trigger by Station#
Schedule Phone Number	VFP	Numeric	14	Trigger by Station/Suffix
Universal Message Box	VFP	Alphanumeric	8 lines xx characters	Trigger by Station Number (Naming convention)

*items are all together

* See Below for location of where information prints on Appointment Card

Site/OCOC Name	Site / OCOG Address	Station/ Site #	Param Facility Name / Address	Map Page Submitted?	Site Phone Number - Information	Site Phone Number - Cancellation	Business Hours	Website
Martinez VA Outpatient Clinic	150 Main Road, Martinez, CA 94553	612	21 Northern California Health Care System	Y	(800) 382-8387	(800) 382-8387	8:30AM - 4:30PM M-F	www.veterans.va.gov

PDF Image

Data from VISTA

Data from Crosswalk

Blue Box

Data From Crosswalk

Department of Veterans Affairs

Martinez VA Outpatient Clinic

150 Main Road
Martinez, CA 94553

We put Veterans first!

1 *****AUTOD*SCN 3-DIGIT 945

G.I. Veterans

1234 main Street
Veterans Town, CA 94445

Your appointment details:

Date: Thursday, Feb 15, 2007
Time: 7:30 am

Clinic: GI Liver BX - Chueng
Location: Reception C, 2nd Floor

Can't make it?
Please call:
(800) 382-8387
to cancel.
A fellow veteran
can have this time slot if you call to cancel at least 24 hours in advance.

Have a question?
Call (800) 382-8387
We look forward to seeing you!

***Please arrive 15 minutes early for your appointment.**

Please bring all your health insurance cards.

VA will continue to provide flu vaccinations until the end of March. Influenza risk is higher a week or more of steady exposure. Request patient's and your safety and get a flu shot.

Printed on 02/07/07 10:00:00
4 pages 1 of 4

Facility Message Box
(Input by Xerox Programmer)

