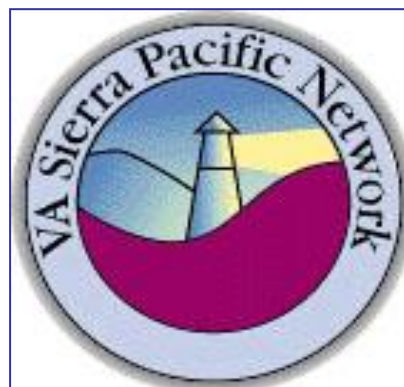


VA Sierra Pacific Network VISN 21



Appointment Reminder Card Implementation Manual Version 1.1 Part 3 of 4 The CrossWalk

March 2010



VA Capitola OPC
1350 N. 41st St., Suite 102 (08CA)
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Region 1 Xerox Post Card Project

Web Page Screen Shots

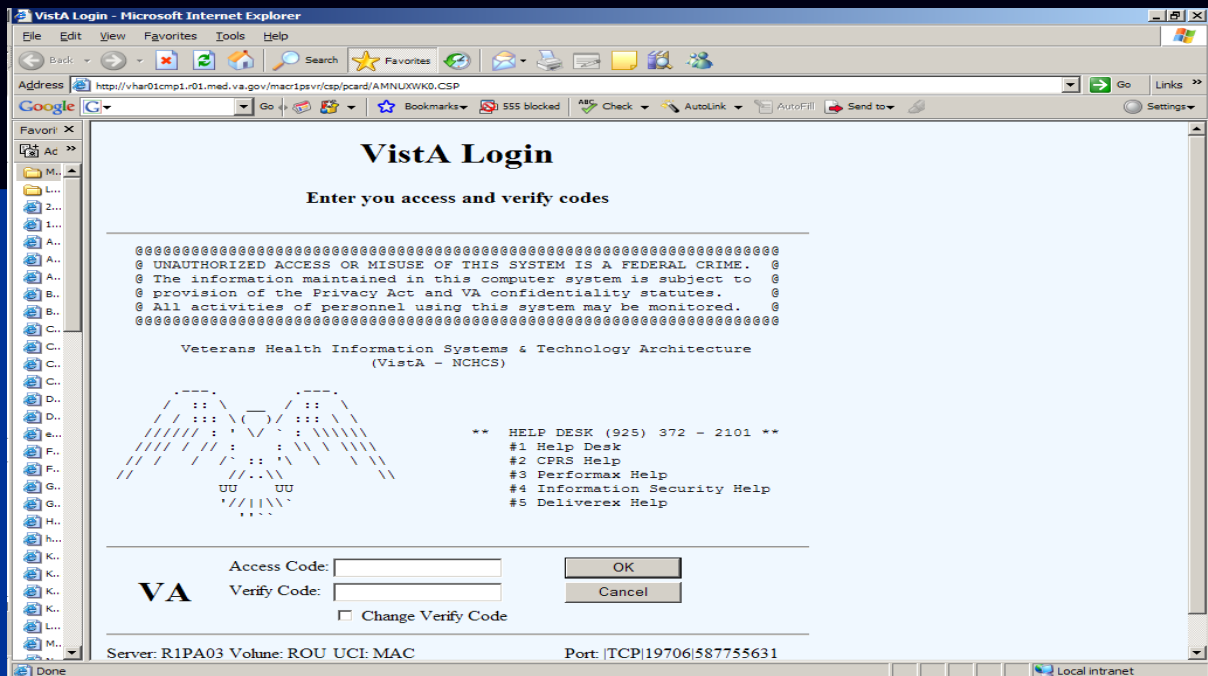
Screen Shots of the web page application which ADPAC(s) from each VAMC will access to setup clinics for printing Xerox Appointment Cards. (March 2010)

Features of Web Page Application

- Authenticated VistA Logon.
- Locked down - can't use browser to navigate back to last user's web page.
- Sanctioned by VISN21 – uses local files for storing data in VistA. Beta tested in Mtz, SF, Fresno & Tucson since summer of '06.
- Application looks up/displays information such as clinic address lines, Boiler Plates & Template linked to BP.
- Application allows for clinic customization of clinic phones & Post Card Type defaults.
- Cloning and multiple select features built in to set up many like clinics at one time.
- Logout link/button clears all session settings & variables. There is a parameter to control what web site it will navigate to upon log out. Reload Page button resets all settings on each web page. Mouse-over help text available on most components.

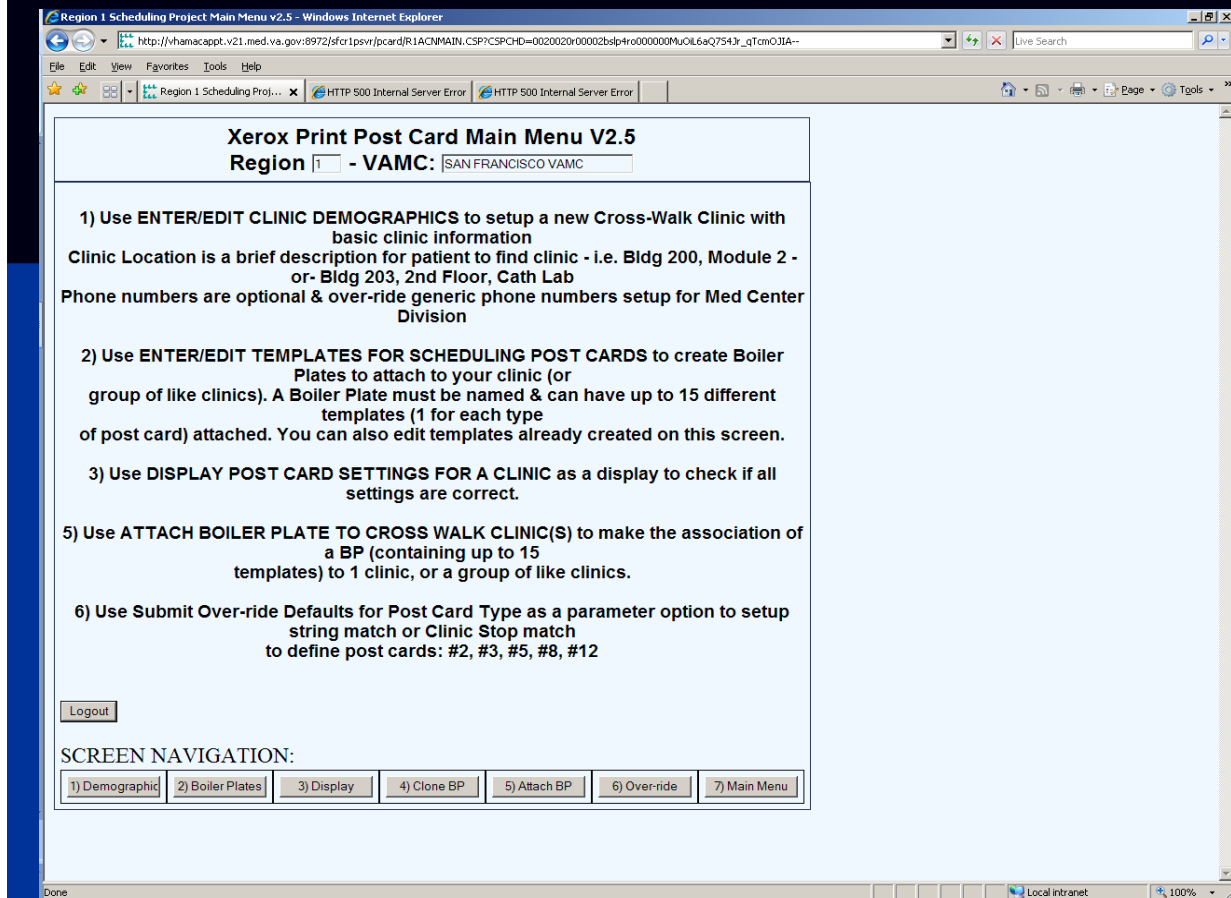
Features of Xerox Web Page Application.

Authenticated Log-on Screen



User will create a bookmarked favorite linking to the VistA Log-on page. (This screen shot is for Martinez VAMC.) Log in just like you would for CPRS. The application then goes to a main page with general information & navigational links.

Xerox Print Post Card Main Menu



The user's Station appears at the top of each web page screen. Navigational links to all pages appear at the bottom of each web page in the application.

Enter/Edit Clinic Demographics

To set up a clinic for this project, select a clinic in the List Box with a mouse click. Opening List Box will display all active clinics for the facility.

-After the user chooses a clinic, Address Line & City/State/Zip are automatically filled in. FYI: Clinic IEN will appear.

-User adds Friendly Name for patient ease of clinic identification. There are 3 lines allowed for the user to describe how to get to the clinic after arriving at the facility.

-Override Phone numbers allow for further customization of the clinic. If filled in, this phone number will override the phone number for the facility listed on the Data Mapping Sheet. If left blank, the phone number on the Data Mapping Sheet for this facility is printed on the card.

Enter/Edit Templates for Post Cards

2) Enter/Edit Templates for Scheduling Post Cards V2.5

Region - VAMC:

To setup a X-Walk Clinic-BP association follow numbered steps

1) Click to Pick Clinic W/O BP: <input type="text" value="Blank"/>	3) View/Edit CrossWalk Clinic W/Attached BP: <input type="text" value="zzTEST"/>	X-WalkClinicEN: <input type="text" value="1041"/> <input type="button" value="Delete CrossWalkClinic"/>
2a) Create NEW Boiler Plate: <input type="text" value="2b) Save New Boiler Plate"/>	4) Select/Edit EXISTING Boiler Plate: <input type="text" value="TESTZZZZ"/>	Display X-Walk Clinic Boiler Plate: <input type="text" value="TESTZZZZ"/>

Must select a clinic from cell '1)' or '3)' above. If selecting clinic from '1)', then select BP from either '2)' or '4)'. If selecting clinic from '3)' then select associated BP in '4)'. Next select Post Card Type from List Box below. Blue Memo Box will open for editing. Click 'Save Boiler Plate' button when finished.

5) Select Post Card:

Blue Box Instructions:

Blue Memo Box is sized appropriately for input 63 characters wide by 9 rows. Click 'ENTER' key at end of each line to format text. Click 'Save Boiler Plate' button below blue box to file your new/edited entry.

Post Card Selection: #

This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 1
This is line 1	This is line 1	This is line 1	This is line 9

SCREEN NAVIGATION:

<input type="button" value="1) Demographic"/>	<input type="button" value="2) Boiler Plates"/>	<input type="button" value="3) Display"/>	<input type="button" value="4) Clone BP"/>	<input type="button" value="5) Attach BP"/>	<input type="button" value="6) Over-ride"/>	<input type="button" value="7) Main Menu"/>
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To setup boiler plate for a newly added clinic:

-For setting up a new clinic that does not yet have a BP, select the clinic from top left-hand column list box – Click to Pick Clinic w/o BP. FYI: Clinic’s IEN will appear in text box in the upper right-hand corner test box. Then type in the name for a new BP you want to add and click the Save BP button. Next select the type of card where you want to add the BP text from Select Post Card list box. After clicking on Select Post Card, blue box will appear. Type in text. Click Save Boiler Plate button.

-Template rules to ensure properly formatted text on Post Cards: Max of 9 lines. Each line may have NO MORE THAN 63 CHARACTERS. Use a hard carriage return at the end of each line. (Blue Box width has been sized to accept 63 characters) Each clinic must have some text in at least one of the 15 Templated Blue Boxes in order to print a card. This functionality was requested as a QA feature.

Select BP & apply Edit to all PCards using that BP

2) Enter/Edit Templates for Scheduling Post Cards V2.5
Region [1] - **VAMC:** [SAN FRANCISCO VAMC]

To setup a X-Walk Clinic-BP association follow numbered steps

1) Click to Pick Clinic W/O BP: [Blank--]	3) View/Edit CrossWalk Clinic W/Attached BP: [zz:TEST]	X-WalkClinicIEN: [T041] [Delete CrossWalkClinic]
2a) Create NEW Boiler Plate: []	4) Select/Edit EXISTING Boiler Plate: [TESTZZZZ]	Display X-Walk Clinic BoilerPlate: [TESTZZZZ]
2b) Save New Boiler Plate		

Must select a clinic from cell '1)' or '3)' above. If selecting clinic from '1)', then select BP from either '2)' or '4)'. If selecting clinic from '3)' then select associated BP in '4)'. Next select Post Card Type from List Box below. Blue Memo Box will open for editing. Click 'Save Boiler Plate' button when finished.

5) Select Post Card: [Appt Coming Up (#4)]

Blue Memo Box is sized to accept 63 characters per line. Blue Box will appear. Make edits in Blue Box. Click Save Template button.

Post Card Selection:

This is line 1 This is line 1	Cancel Clinic/No Reschedule-Alert (#13)	line 1
This is line 1 This is line 1	Canceled Appt + New Appt Alert (#11)	line 1
This is line 1 This is line 1	Comp & Pen (#2)	line 1
This is line 1 This is line 1	Fee Based Service at Non-VA Site (#14)	line 1
This is line 1 This is line 1	Group Orientation Appt - Alert (#12)	line 1
This is line 1 This is line 1	Means Test 0 day (#7)	line 1
This is line 1 This is line 1	Mobile Svcs Appt (#6)	line 1
This is line 1 This is line 1	No Show - Please Call Us (#10)	line 1
This is line 1 This is line 1	Phone Consult (#5)	line 1
This is line 1 This is line 1	Pre-App/ACA (#1)	line 1

6) Save Boiler Plate
7) Refresh Page before Next Clinic Selection

SCREEN NAVIGATION:

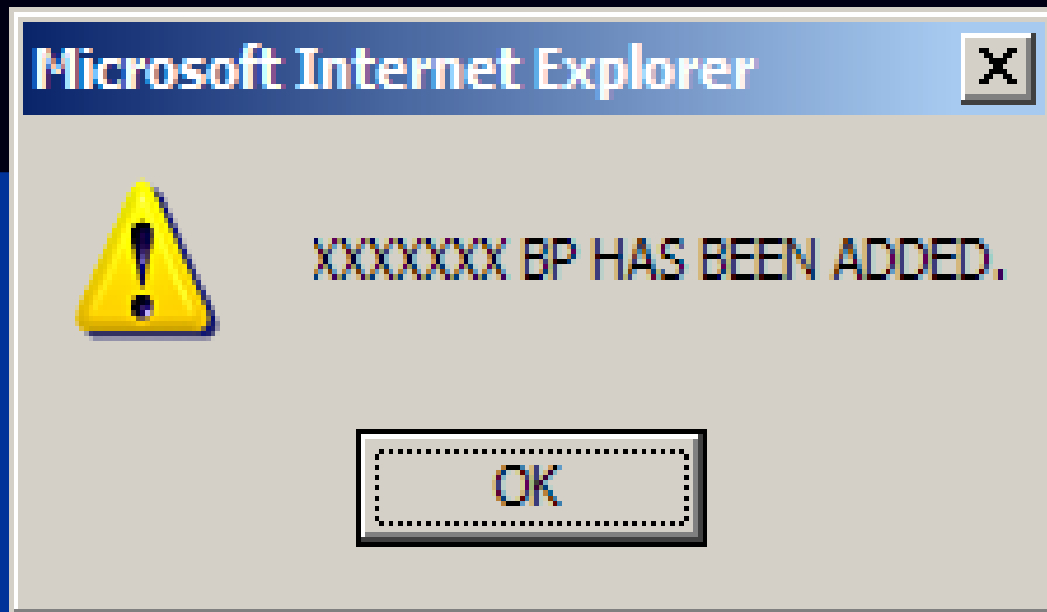
1) Demographic	2) Boiler Plates	3) Display	4) Clone BP	5) Attach BP	6) Over-ride	7) Main Menu
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For clinic with currently attached BP, select clinic at the top middle column as shown on this slide. FYI: Clinic's IEN will appear in text box in right hand column. Attached BP will appear below that. To edit text of the BP, select post card number in drop-down box associated with BP. Blue Box will appear. Make edits in Blue Box. Click Save Template button.

To apply edits to all clinics with that attached BP, click Apply Changes to All Clinics w/Same BP button.

-Template rules to ensure properly formatted text on Post Cards: Max of 9 lines. Each line may have NO MORE THAN 63 CHARACTERS. (Blue Box width has been sized to accept 63 characters per line.) Use a hard carriage return at end of each line. Each clinic must have some text in one of the 15 Templated Blue Boxes in order to print a card. This functionality was requested as a QA feature.

Example of Pop-up Message box after submit button



Useful popup message boxes appear throughout application.

View Current Settings for Post Card

3) Display Post Card Settings for a Clinic v2.5
Region - VAMC:

Click to Pick CrossWalk Clinic:

Clinic IEN:
Friendly Name:
Clinic Location:
Clinic Location:
Clinic Location:
Address Line:
City State Zip:
BP for Selected Clinic:
Mail Stop:
Clinic Override:
Cancel Phone #:
Clinic Override:
Make Appt Phone:

Blue Box / Special Instructions

Please Call Us for an Appointment - [PC Type# 1]

Time To Make An Appointment
Please call during our regular business hours
Have the following information available:
Your Name
Your SSN
Date(s) and Time(s) you want to be seen.

Compensation & Pension - [PC Type# 2]
Can't make it?

View all current settings for a clinic after clicking on Display Post Card Settings for a Clinic. Note that EDITS CANNOT BE MADE ON THIS SCREEN – text boxes have been grayed out & made read-only. Scroll down to see all 15 Templated Blue Boxes.

Clone a Boiler Plate

4) Make Cloned Boiler Plate & Edit its Templates v2.5
Region - VAMC:

1) Click to Select Boiler Plate to be Cloned:

2) Type in New Boiler Plate Name:
3) Click to Save New BP Name

4) Select Post Card Type:

Blue Box / Special Instructions:
5) Edit Text as desired. Dimensions of boxes on the Post Card: 63 characters wide by 9 rows. Click 'ENTER' key at end of each line to format text. Click SUBMIT button at bottom of page to file your new/edited entry.
Post Card Selection: #

SCREEN NAVIGATION:

To make a new boiler plate which is a clone of an existing BP, select the starting BP to be cloned from the top list box (1).

Type in the name of the new resulting boiler plate you want to make in the text box (2) and then Click to Save New BP Name (3).

Note default Template # linked to original BP appears in grayed-out text box. Select that Template from (4) Select & Edit Templates for Post Cards(s). Edit the text to make the new BP. Click the Save Template button to save the new boiler plate.

Edit Text of Newly Cloned Boiler Plate

4) Make Cloned Boiler Plate & Edit its Templates v2.5
Region - VAMC:

1) Click to Select Boiler Plate to be Cloned:

2) Type in New Boiler Plate Name:

4) Select Post Card Type:

Blue Box / Special Instructions:
5) Edit Text as desired. Dimensions of boxes on the Post Card: 63 characters wide by 9 rows. Click 'ENTER' key at end of each line to format text. Click SUBMIT button at bottom of page to file your new/edited entry.

Post Card Selection: #4

This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1
This is line 1 This is line 1 This is line 1 This is line 1

SCREEN NAVIGATION:

This slide shows the editing of the Blue Box. Click Save Template (6) button to save the new BP.

Attach Boiler Plate to Cross Walk Clinic(s)

5) Attach Boiler Plate to Cross Walk Clinic(s) v2.5
Region - VAMC:

1) Click to Select Boiler Plate. Use right-hand slider bar to view choices from list:

2) To apply Selected Boiler Plate, Click to Select Clinic(s): (Ctrl + click to select multiple clinics. Shift + click to select range of clinics)

AC-NURSING-FLU
AC-NURSING-LVN F/U-MODULE II
AC-NURSING-RN F/U-MEDINA
AC-NURSING-RN F/U-MODULE III

SCREEN NAVIGATION:

- 1) Select Boiler Plate from List Box at top of screen.
- 2) Click to select clinic(s) to apply the BP to from the second List Box. Use Control-click to select multiple clinics. Use Shift-click combination to select a range of clinics. Use care in selecting clinics, it is very easy to attach a boiler plate to the wrong clinic. If this happens, carefully link the boiler plate to the appropriate clinic(s). Also remember when editing boiler plate text on screen #2, all clinics need to be re-linked to the edited boiler plate on this screen to have the edited text linked to that/those clinic(s).
- 3) Click button to Apply BP to Selected Clinic(s).
- 4) Click on the Refresh Page button, before selecting the next Boiler Plate round.

Submit Over-ride Defaults for Post Card Type

6) Submit Over-ride Defaults for Post Card Type v2.5
Region - VAMC:
To Define Post Cards: #2, #3, #5, #7, #8, #12
- EITHER -
1) Select Post Card Type:
Display Existing Credit Stop: AMIS Stop Code:
1a) Select to Default to Credit Stop:
1b) Save Credit Stop
- AND/OR -
2) Select Post Card Type:
2a) Type in Partial Name of Clinic to Match-On:
2b) Save Match-On String
3) Click Appropriate Action:
SCREEN NAVIGATION:

This screen allows for two additional customizations of Postcard Types. The screen is currently written to setup configuration of Comp & Pen Post Cards. In VistA for instance, many sites do a nice work-around to print Comp & Pen letters by using VistA option: Print Scheduling Letters. Within SDRPLETTERS, if the Pre-Appointment letter is selected on any specially designated clinics, a Comp & Pen letter prints as the default.

- 1) Like-wise in this application, if the clinic has a Credit Stop of COMP & PENS (C&P) EXAMS” with an AMIS Stop Code =450 (as shown on the screen above), this will trigger the application to send COMP & PEN type Xerox Postcards to be printed.
- 2) Or a partial string of the clinic name to pattern match on to produce Comp & Pen Postcards can be entered. Many VAMC’s clinic names contain “C&P” to denote Comp & Pen type clinics.

***** Note: It is expected that the functionality on this screen will expand when additional postcard types are being printed.

After clicking on the Logout Button



There is a site parameter to adjust for what web site application will navigate to upon Log Out. Clean-up of session and local variables is done upon Log Out. San Francisco has theirs set at their Intranet site as shown above.