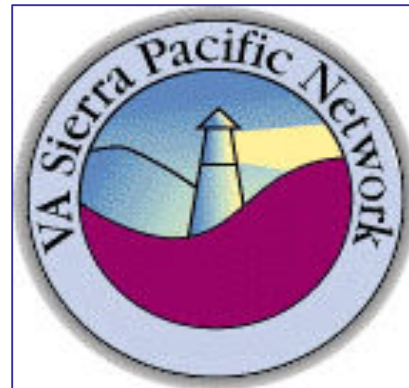


VA Sierra Pacific Network VISN 21



Appointment Reminder Card Implementation Manual Version 1.1 Part 4 of 4 VistA Postcard Applications

March 2010



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

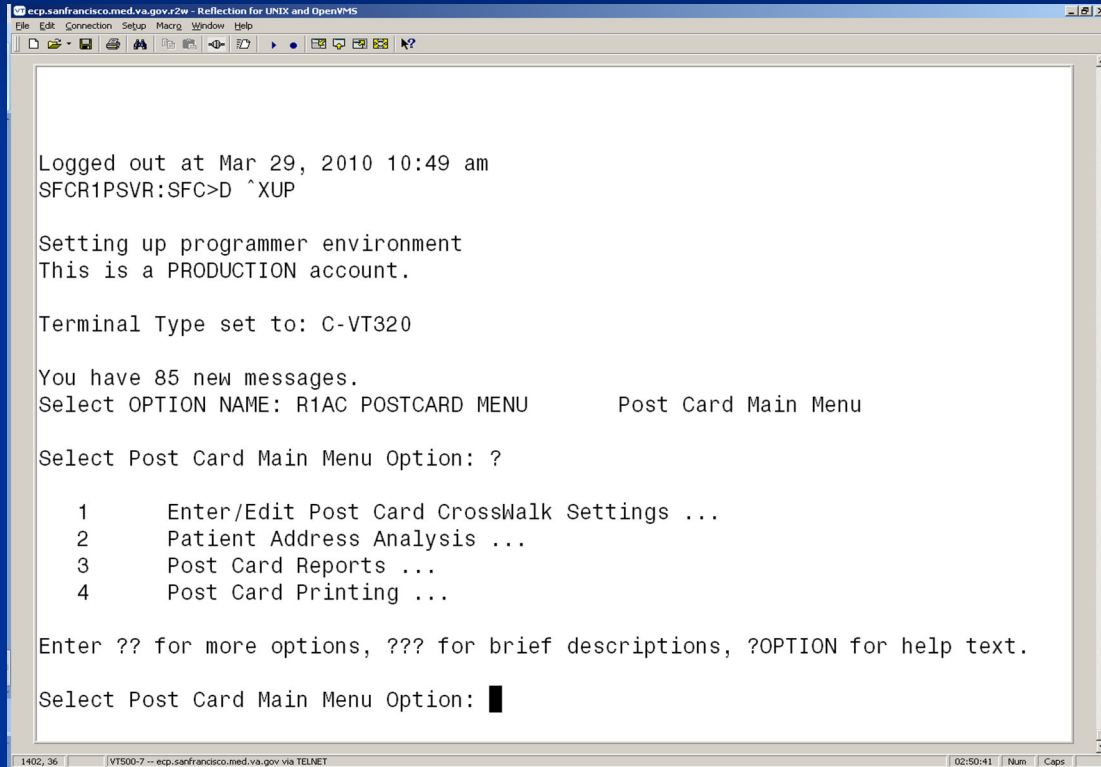


**We put
Veterans first!**

Presorted
First Class Mail
U.S. Postage
PAID
Permit No. 00

|||||
T14 P1 *****AUTO**3-DIGIT 145
George Peterson
123 Jay Street
Smithville CA 12345-1230

Main Menu for VistA Post Card Application



The screenshot shows a Telnet window titled "ecp.sanfrancisco.med.va.gov.r2w - Reflection for UNIX and OpenVMS". The window contains the following text:

```
Logged out at Mar 29, 2010 10:49 am
SFCR1PSVR:SFC>D ^XUP

Setting up programmer environment
This is a PRODUCTION account.

Terminal Type set to: C-VT320

You have 85 new messages.
Select OPTION NAME: R1AC POSTCARD MENU          Post Card Main Menu

Select Post Card Main Menu Option: ?

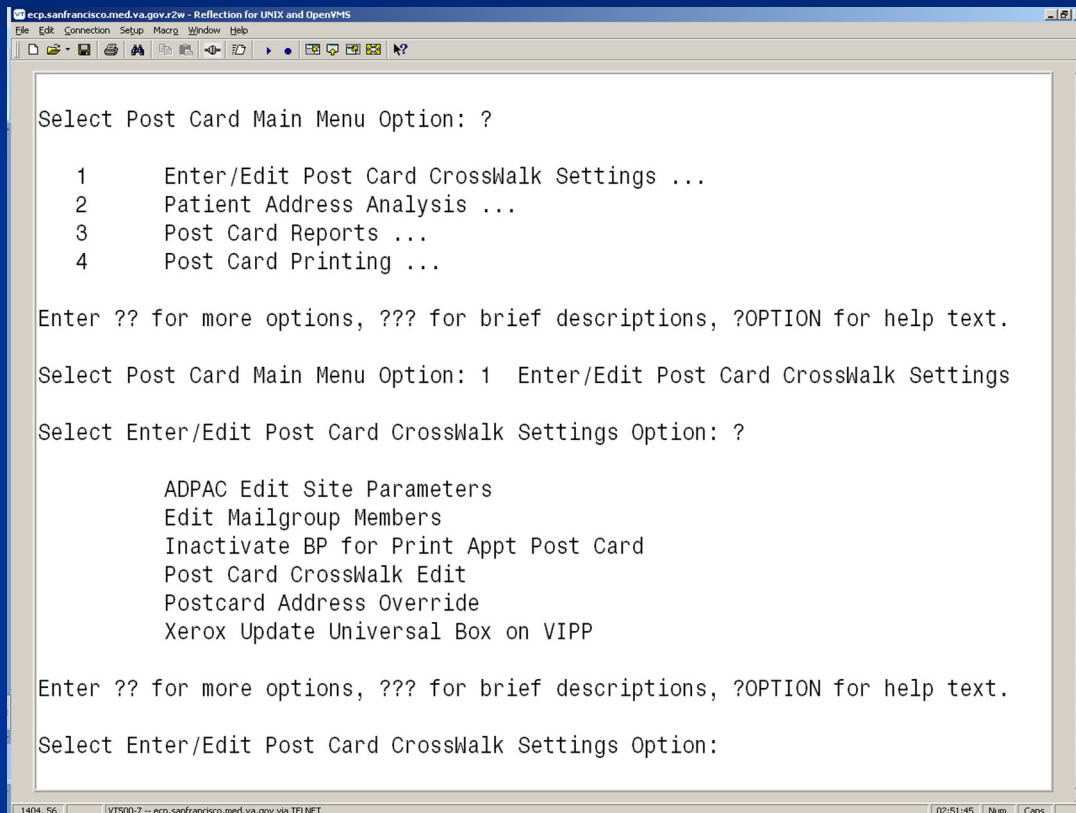
    1      Enter/Edit Post Card CrossWalk Settings ...
    2      Patient Address Analysis ...
    3      Post Card Reports ...
    4      Post Card Printing ...

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.
Select Post Card Main Menu Option: █
```

The window also shows a status bar at the bottom with the text "1402, 36" and "VT500-7 -- ecp.sanfrancisco.med.va.gov via TELNET".

Main Menu of VistA Postcard Application

1 Enter/Edit Post Card CrossWalk Settings



The screenshot shows a Telnet window titled "ecp.sanfrancisco.med.va.gov.t2w - Reflection for UNIX and OpenVMS". The window displays a menu for "Select Post Card Main Menu Option: ?" with four options: 1. Enter/Edit Post Card CrossWalk Settings ..., 2. Patient Address Analysis ..., 3. Post Card Reports ..., and 4. Post Card Printing Below the menu, it says "Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text." The user has selected option 1, and the prompt changes to "Select Enter/Edit Post Card CrossWalk Settings Option: ?". A second menu is displayed with the following options: ADPAC Edit Site Parameters, Edit Mailgroup Members, Inactivate BP for Print Appt Post Card, Post Card CrossWalk Edit, Postcard Address Override, and Xerox Update Universal Box on VIPP. Again, it says "Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text." The prompt changes to "Select Enter/Edit Post Card CrossWalk Settings Option:". The window's status bar at the bottom shows "1404, 56", "VT500-7 -- ecp.sanfrancisco.med.va.gov via TELNET", and "02:51:45 Num Caps".

```
ecp.sanfrancisco.med.va.gov.t2w - Reflection for UNIX and OpenVMS
File Edit Connection Setup Macro Window Help
Select Post Card Main Menu Option: ?

1      Enter/Edit Post Card CrossWalk Settings ...
2      Patient Address Analysis ...
3      Post Card Reports ...
4      Post Card Printing ...

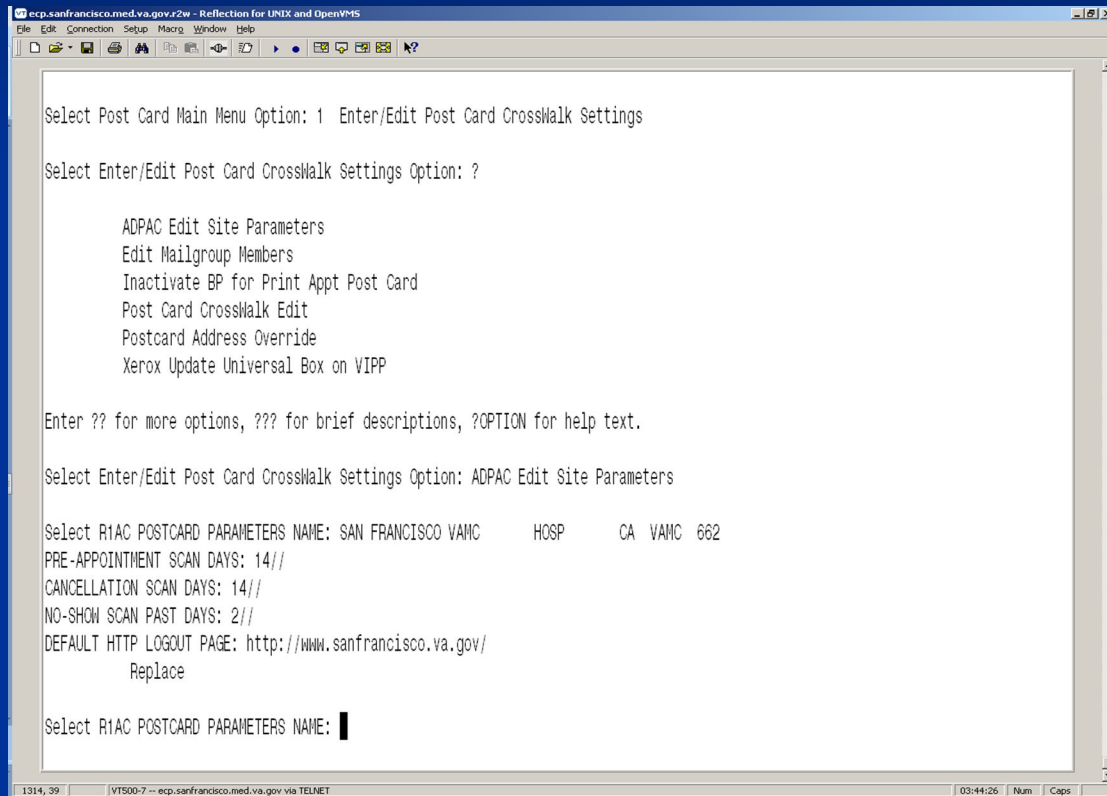
Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.
Select Post Card Main Menu Option: 1  Enter/Edit Post Card CrossWalk Settings
Select Enter/Edit Post Card CrossWalk Settings Option: ?

      ADPAC Edit Site Parameters
      Edit Mailgroup Members
      Inactivate BP for Print Appt Post Card
      Post Card CrossWalk Edit
      Postcard Address Override
      Xerox Update Universal Box on VIPP

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.
Select Enter/Edit Post Card CrossWalk Settings Option:
```

Sub-menus under Enter/Edit Post Card Crosswalk Settings. There are edit options here which can only be setup in Vista, but the Post Card Crosswalk Edit option has most of the features that are contained in the Crosswalk.

ADPAC Edit Site Parameters



```
ecp.sanfrancisco.med.va.gov.r2w - Reflection for UNIX and OpenVMS
File Edit Connection Setup Macro Window Help
Select Post Card Main Menu Option: 1 Enter/Edit Post Card CrossWalk Settings
Select Enter/Edit Post Card CrossWalk Settings Option: ?
    ADPAC Edit Site Parameters
    Edit Mailgroup Members
    Inactivate BP for Print Appt Post Card
    Post Card CrossWalk Edit
    Postcard Address Override
    Xerox Update Universal Box on VIPP
Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.
Select Enter/Edit Post Card CrossWalk Settings Option: ADPAC Edit Site Parameters
Select R1AC POSTCARD PARAMETERS NAME: SAN FRANCISCO VAMC      HOSP      CA VAMC 662
PRE-APPOINTMENT SCAN DAYS: 14//
CANCELLATION SCAN DAYS: 14//
NO-SHOW SCAN PAST DAYS: 2//
DEFAULT HTTP LOGOUT PAGE: http://www.sanfrancisco.va.gov/
    Replace
Select R1AC POSTCARD PARAMETERS NAME: █
```

This option allows the ADPAC to edit site parameters for the number of days in advance that post cards are sent out for the #4 pre-Appointment Post Cards, #13 Cancellation Post Cards & #10 No Show Post Cards. It also allows the ADPAC to manipulate which logout page is presented in the CrossWalk.

Post Card CrossWalk Edit

CLINIC: zz!TEST

Friendly Name: ZZTEST CLINIC

Location(1): zzWomenZ`xx

Location(2): zzGo to Bldg200

Location(3): ZZZROOM 203`xxx

Address L1: 4150 CLEMENT STREET

Address L2: SAN FRANCISCO CA 94121

Please Call Us (1): Appt Location Change - Alert (9):

Compensation & Pension (2): No Show - Please Call US (10):

Appointment + Bring ?? (3): Cancelled Appt + New Appt (11):

Appointment Coming Up (4): Group Orientation Appt - Alert (12):

Phone Consultation (5): Cancel Appt/No Reschedule - Alert (13):

Means Test - 60/30 day (6): Fee-Based Service at Non-VA Site (14):

Means Test - 0 day (7): Birthday (15):

Mobile Services Appt (8):

Exit Save Refresh

Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: Press <PF1>H for help

Use this option if your server is down & you are unable to log into the CrossWalk. This option is written in List Manager (like Appointment Management), so remember to save all changes before exiting the option. Also, the boiler plate functionality is not present in this option so each Blue Box Text message will have to be entered for the selected clinic.

Post Card Address Override

ecp.sanfrancisco.med.va.gov/2w - Reflection for UNIX and OpenVMS

Medical Center Division: SANTA ROSA, CA CBOC

This information will override the default medical facility address on the Appointment Cards associated with this facility.

Address line 1...: 3841 Brickway Blvd
Address line 2...:
City.....: SANTA ROSA
State.....: CA
Zip.....: 95403

Exit Save Refresh

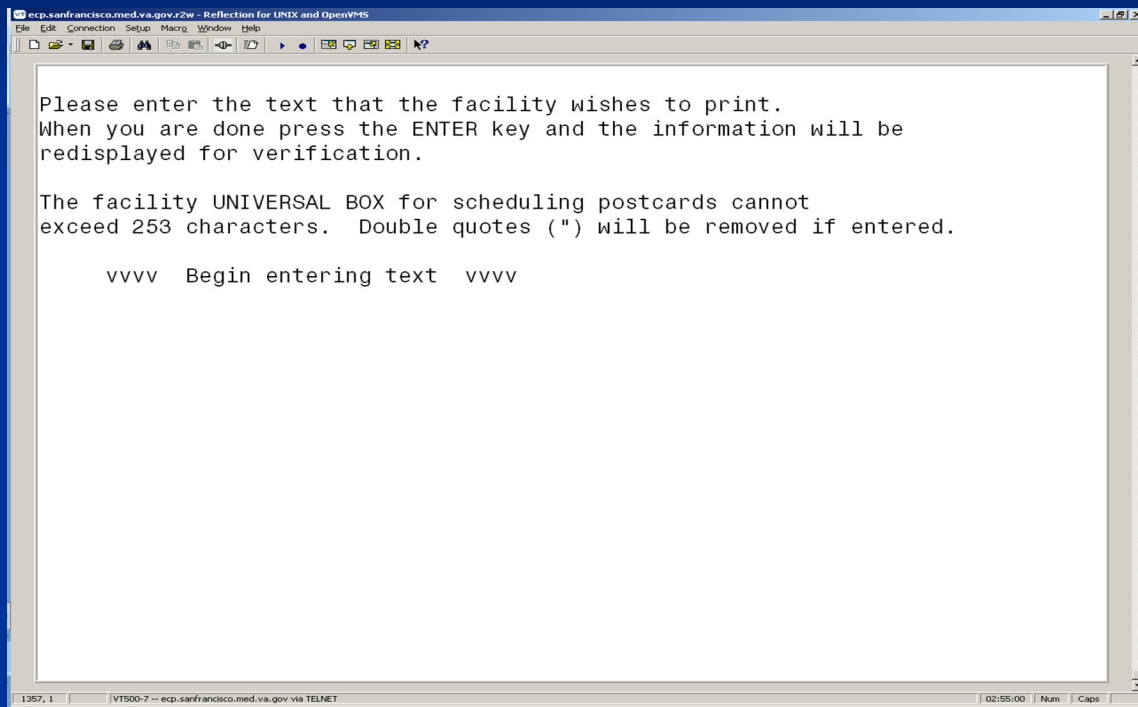
Enter a command or '^' followed by a caption to jump to a specific field.

COMMAND: XXXXXXXXXX Press <PF1>H for help **Insert**

1359, 10 VT500-7 --- ecp.sanfrancisco.med.va.gov via TELNET 02:54:23 Num Caps

Use this option (written in List Manager) if you want a different return address to print on the post card for any CBOC that is selected.

Xerox Update Universal Box on VIPP

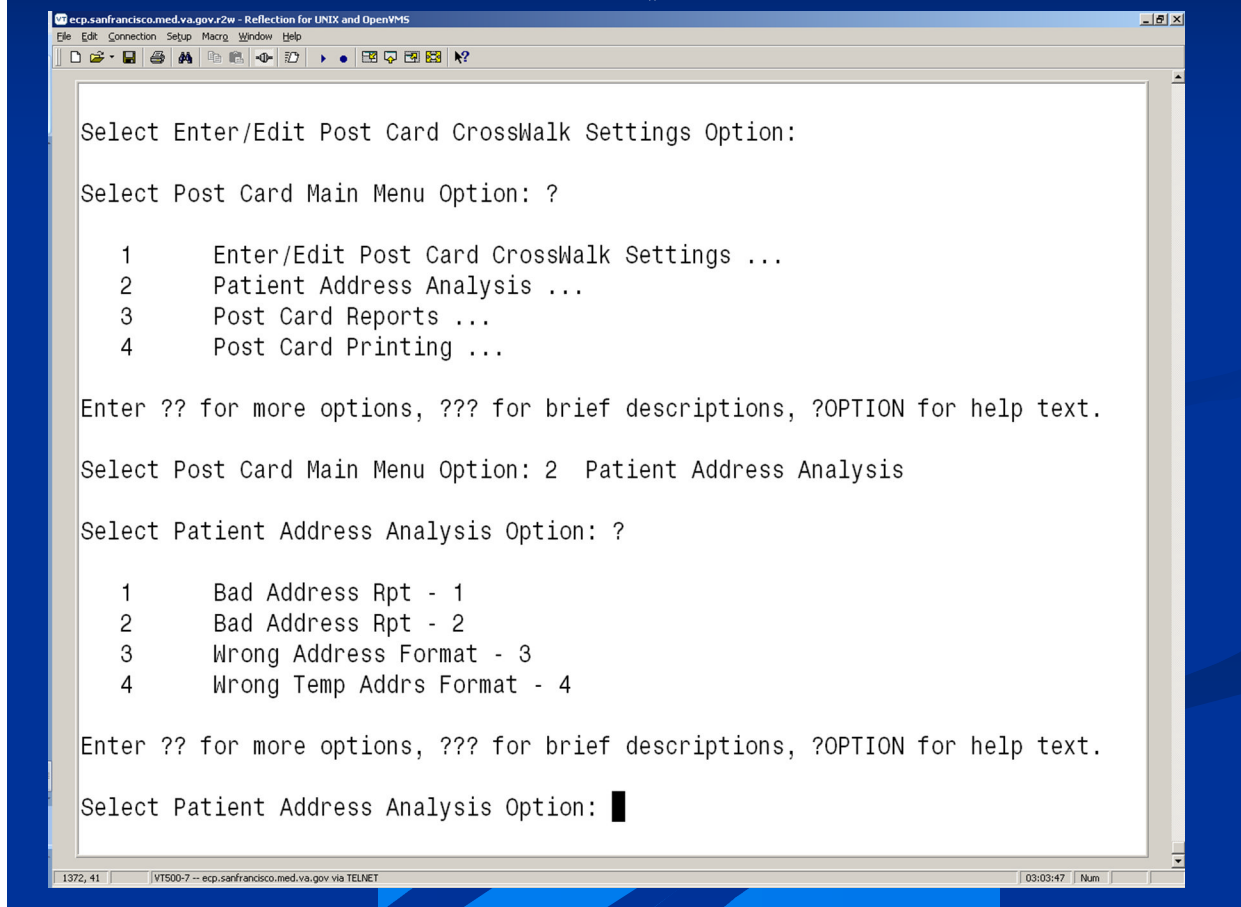


YOU MUST USE REFLECTIONS TO ACCESS VISTA TO MAKE EDITS OR CHANGES TO THE UNIVERSAL BOX!

Type in Universal Text Box Message here. Word Smith something up in Note Pad or Word, turn off word wrap. Count all key strokes and spaces to make sure the message does not exceed 253 characters. Open this VistA option & copy then paste in the message. Use your preferred editor command to save & exit this option.

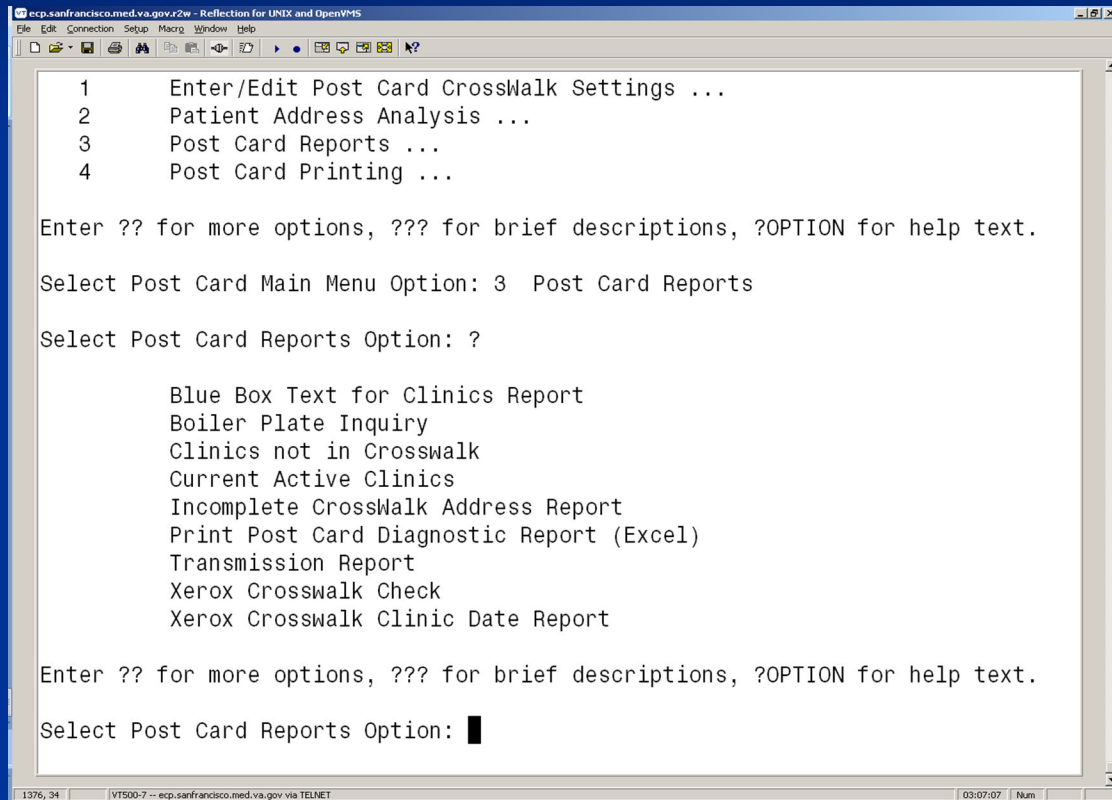
The text will be sent to the Xerox Printing Site (RRC) that evening and will be incorporated on your post cards that are printed the next day.

2 Reports for Patient Address Analysis



Run the 4 reports listed above as a hard copy and decide the best strategy for your facility to clean up patient addresses prior to setting up anything in the CrossWalk. (Note: Reports DO NOT SCRUB ADDRESSES – they only report what may be in an incorrect format. The user must use standard MAS VistA options to edit each suspect patient address in accordance with VHA DIRECTIVE 2009-021.

3 Post Card Reports



The screenshot shows a Telnet window titled "ecp.sanfrancisco.med.va.gov.r2w - Reflection for UNIX and OpenVMS". The window contains a menu with four options: 1. Enter/Edit Post Card CrossWalk Settings ..., 2. Patient Address Analysis ..., 3. Post Card Reports ..., and 4. Post Card Printing ... Below the menu, it prompts the user to "Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text." The user has selected option 3, "Post Card Reports", and the window now displays a sub-menu for "Post Card Reports" with the following options: Blue Box Text for Clinics Report, Boiler Plate Inquiry, Clinics not in Crosswalk, Current Active Clinics, Incomplete CrossWalk Address Report, Print Post Card Diagnostic Report (Excel), Transmission Report, Xerox Crosswalk Check, and Xerox Crosswalk Clinic Date Report. It again prompts the user to "Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text." The user has entered a question mark, and the prompt "Select Post Card Reports Option: ?" is shown. The status bar at the bottom of the window displays "1376, 34", "VT500-7 - ecp.sanfrancisco.med.va.gov via TELNET", and "03:07:07 Num".

```
ecp.sanfrancisco.med.va.gov.r2w - Reflection for UNIX and OpenVMS
File Edit Connection Setup Macro Window Help
1 Enter/Edit Post Card CrossWalk Settings ...
2 Patient Address Analysis ...
3 Post Card Reports ...
4 Post Card Printing ...

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.

Select Post Card Main Menu Option: 3 Post Card Reports

Select Post Card Reports Option: ?

    Blue Box Text for Clinics Report
    Boiler Plate Inquiry
    Clinics not in Crosswalk
    Current Active Clinics
    Incomplete CrossWalk Address Report
    Print Post Card Diagnostic Report (Excel)
    Transmission Report
    Xerox Crosswalk Check
    Xerox Crosswalk Clinic Date Report

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.

Select Post Card Reports Option: ?
```

Use Blue Box Test for Clinics Report & Boiler Plate Inquiry to help identify text attached to a specific clinic or a specific boiler plate.

Current Active Clinics

```

***  SAN FRANCISCO VAMC Active Clinics  ***
      Dt X-Walk      Linked In      Inst
CLINIC NAME      Added      By Whom      In X-Walk?      Link
=====
AC-NURSING-FLU      10/29/09      LIU,MIKE U      YES      SAN FRANCIS
AC-NURSING-LVN F/U-MODU      10/28/09      LIU,MIKE U      YES      SAN FRANCIS
AC-NURSING-RN F/U-MEDIN      09/04/09      LIU,MIKE U      YES      SAN FRANCIS
AC-NURSING-RN F/U-MODUL      10/28/09      LIU,MIKE U      YES      SAN FRANCIS
AC-NURSING-RN F/U-REYES      10/28/09      LIU,MIKE U      YES      SAN FRANCIS
AC-NURSING-RN F/U-TONGS      09/04/09      LIU,MIKE U      YES      SAN FRANCIS
Enter RETURN to continue or '^' to exit:

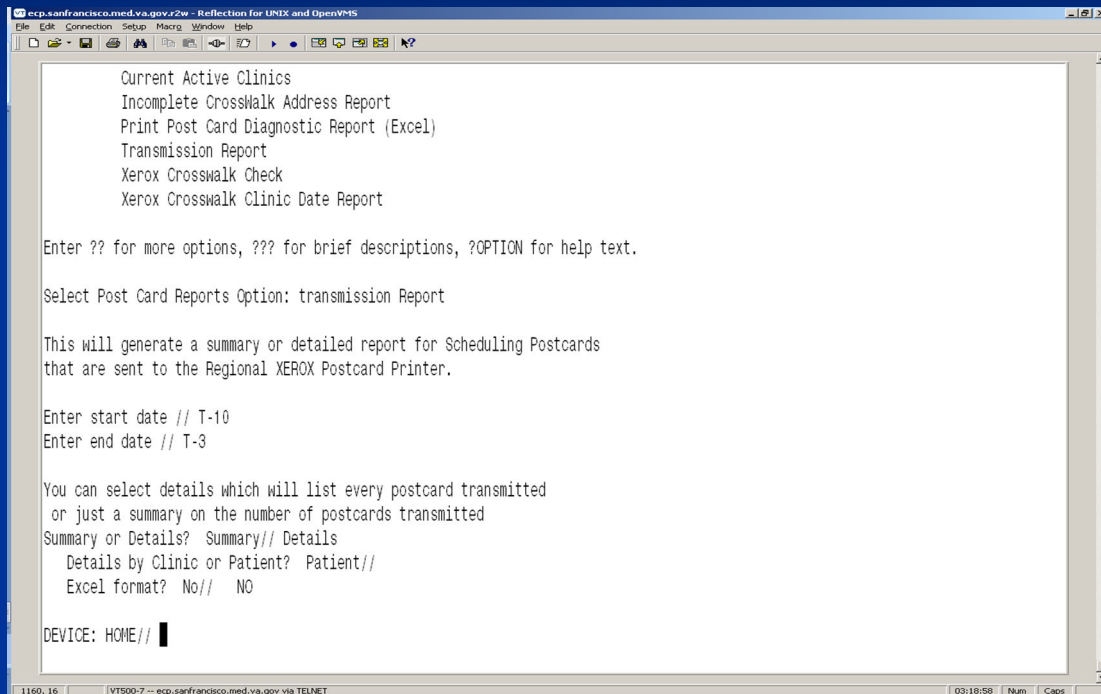
```

Use Current active Clinics as a hard copy to prioritize which active clinics at your facility still need to be added to the CrossWalk. The right-hand column lists the INSTITUTION file link. If this is blank for a clinic, that clinic will print a postcard without a return address. The INSTITUTION link can be added thru File Man edit of the Institution field in the HOSPITAL LOCATION file for a specific clinic.

Print Post Card Diagnostic Report (Excel)

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Transmission Report



```
ecp.sanfrancisco.med.va.gov.v2w - Reflection for UNIX and OpenVMS
File Edit Connection Setup Macro Window Help
[Icons]

Current Active Clinics
Incomplete CrossWalk Address Report
Print Post Card Diagnostic Report (Excel)
Transmission Report
Xerox Crosswalk Check
Xerox Crosswalk Clinic Date Report

Enter ?? for more options, ??? for brief descriptions, ?OPTION for help text.

Select Post Card Reports Option: transmission Report

This will generate a summary or detailed report for Scheduling Postcards
that are sent to the Regional XEROX Postcard Printer.

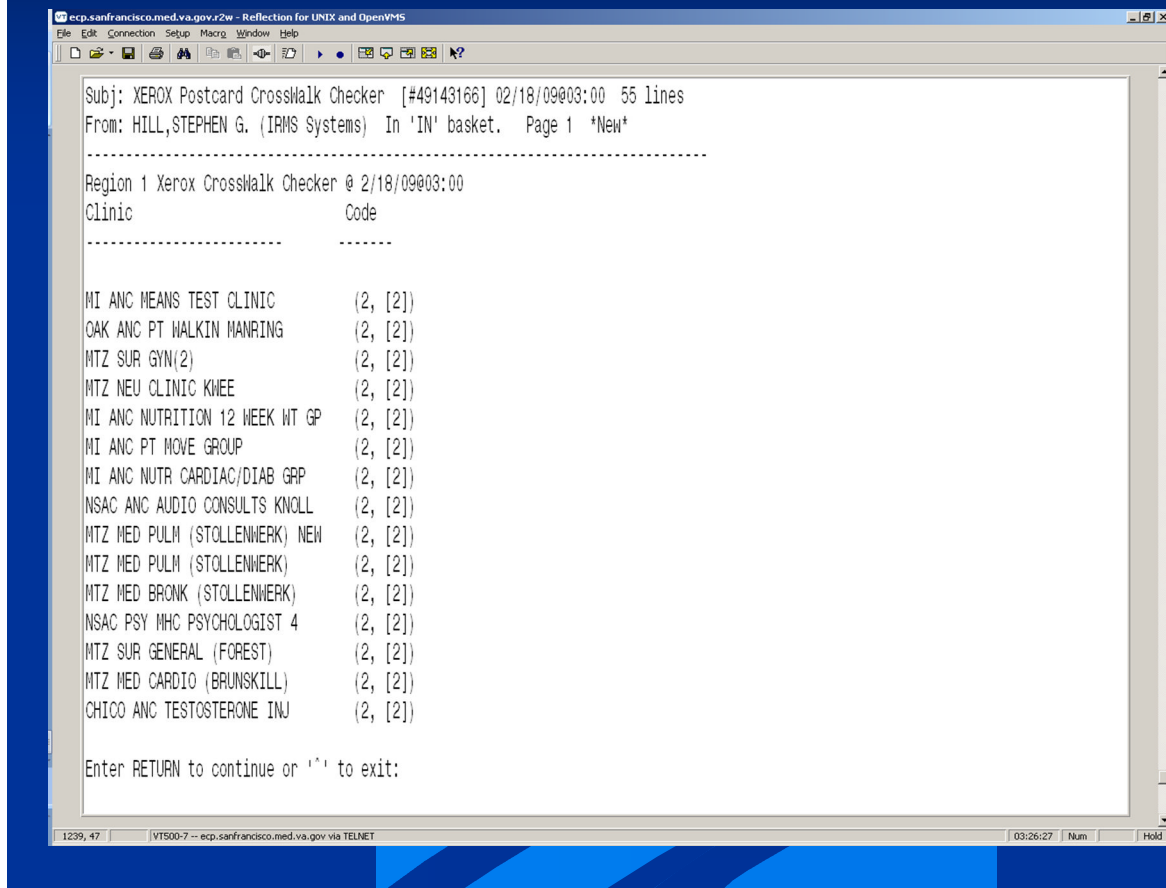
Enter start date // T-10
Enter end date // T-3

You can select details which will list every postcard transmitted
or just a summary on the number of postcards transmitted
Summary or Details? Summary// Details
Details by Clinic or Patient? Patient//
Excel format? No// NO

DEVICE: HOME//
```

The post card Transmission Report gives a useful look at a date range which can be run in either Summary or Details mode. The date(s) selected would be the date(s) that the data is transmitted to the Xerox Printing Site/RRC. Use this option for Quality Assurance purposes to trace out if a particular patient post card has been transmitted for printing.

Xerox Crosswalk Check



The screenshot shows a TELNET window titled "ecp.sanfrancisco.med.va.gov.r2w - Reflection for UNIX and OpenVMS". The window displays the output of the "Xerox Crosswalk Checker" command. The header information includes the subject "XEROX Postcard CrossWalk Checker [#49143166]", the date and time "02/18/09@03:00", the number of lines "55 lines", and the sender "HILL,STEPHEN G. (IRMS Systems) In 'IN' basket. Page 1 *New*". The main content is a table with two columns: "Clinic" and "Code". The table lists 18 clinics and their corresponding codes, each followed by a count in parentheses, such as "(2, [2])". The clinics listed are: MI ANC MEANS TEST CLINIC, OAK ANC PT WALKIN HANRING, MTZ SUR GYN(2), MTZ NEU CLINIC KNEE, MI ANC NUTRITION 12 WEEK WT GP, MI ANC PT MOVE GROUP, MI ANC NUTR CARDIAC/DIAB GRP, NSAC ANC AUDIO CONSULTS KNOLL, MTZ MED PULM (STOLLENWERK) NEW, MTZ MED PULM (STOLLENWERK), MTZ MED BRONK (STOLLENWERK), NSAC PSY MHC PSYCHOLOGIST 4, MTZ SUR GENERAL (FOREST), MTZ MED CARDIO (BRUNSKILL), and CHICO ANC TESTOSTERONE INJ. At the bottom of the window, it says "Enter RETURN to continue or '^' to exit:". The window's status bar at the bottom shows "1239, 47", "VT500-7 -- ecp.sanfrancisco.med.va.gov via TELNET", "03:26:27", "Num", and "Hold".

```
Subj: XEROX Postcard CrossWalk Checker [#49143166] 02/18/09@03:00 55 lines
From: HILL,STEPHEN G. (IRMS Systems) In 'IN' basket. Page 1 *New*

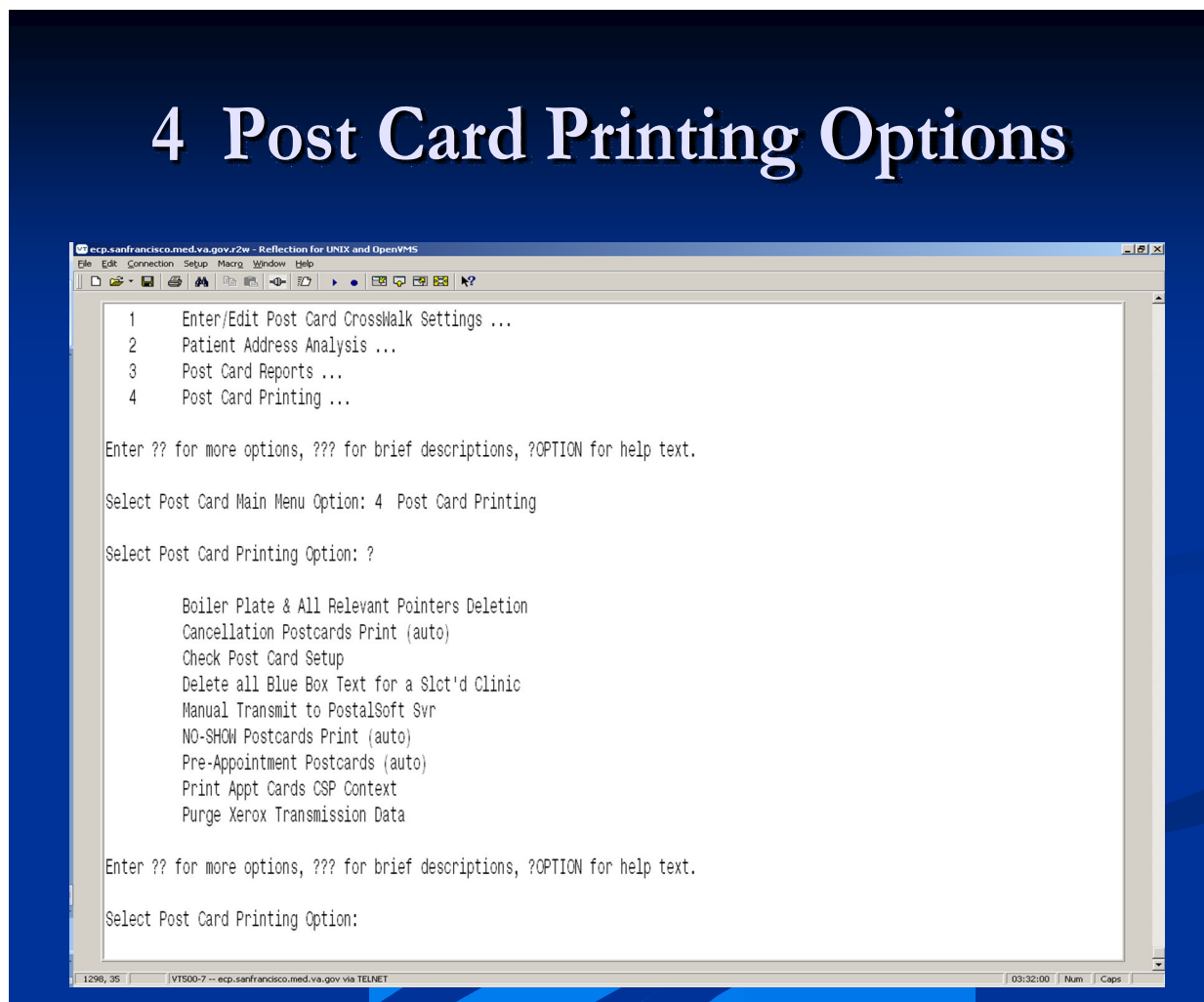
-----
Region 1 Xerox CrossWalk Checker @ 2/18/09@03:00
Clinic                               Code
-----
MI ANC MEANS TEST CLINIC             (2, [2])
OAK ANC PT WALKIN HANRING            (2, [2])
MTZ SUR GYN(2)                       (2, [2])
MTZ NEU CLINIC KNEE                  (2, [2])
MI ANC NUTRITION 12 WEEK WT GP       (2, [2])
MI ANC PT MOVE GROUP                 (2, [2])
MI ANC NUTR CARDIAC/DIAB GRP         (2, [2])
NSAC ANC AUDIO CONSULTS KNOLL        (2, [2])
MTZ MED PULM (STOLLENWERK) NEW       (2, [2])
MTZ MED PULM (STOLLENWERK)           (2, [2])
MTZ MED BRONK (STOLLENWERK)          (2, [2])
NSAC PSY MHC PSYCHOLOGIST 4          (2, [2])
MTZ SUR GENERAL (FOREST)             (2, [2])
MTZ MED CARDIO (BRUNSKILL)           (2, [2])
CHICO ANC TESTOSTERONE INJ           (2, [2])

Enter RETURN to continue or '^' to exit:
```

When executing this option, a VistA mailman message will be sent to the specified mail group if there are any problems in the Blue Box Text for any clinics setup in the CrossWalk. Problems are coded at the end of the message. The problems may include: No text in any of the Blue Boxes for a specific clinic, one or more lines in a Blue Box exceeds 63 characters, or more than 9 lines of text (or trailing lines of spaces) are present. It is important to know that No post cards will transmit for printing if one or more of these conditions are present.

This option can be queued to run nightly through Task Manager so that the ADPAC will have an email the next morning if there is anything wrong in the CrossWalk Blue Box setup. THE MESSAGE WILL NOT BE SENT IF NO ERRORS ARE FOUND IN THE CROSSWALK CLINICS BLUE BOX SETUP.

4 Post Card Printing Options



The options on this menu are generally more for IRMS use.

- The three "(auto)" options transmit postcards to the Xerox Printing Site/RRC. They can each be run in the Test-Mode or Live-Mode.

- The Delete All Blue Box Text for a Slct'd Clinic & Boiler Plate & All Relevant Pointers Deletion can be used in that order to remove text from Blue Boxes and Boiler Plates.

- Check Post Card Setup is run to check the "sftp" line from the site to the Xerox Printing Site/RRC.

- Manual Transmit to PostalSoft Svr will flush out any postcards "stuck on the sending site's database". The data stream will be sent to the Xerox Printing Site/RRC.

- Print Appt Cards CSP Context is a menu option that a user must have in order to log into the Crosswalk.

- Purge Xerox Transmission Data will purge all data exceeding that setup in the Parameter file.