Clinical Information Support System

Patient-Centered Management Module (PCMM)

User Guide

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GETTING STARTED

PCMM Overview

The Patient-Centered Management Module (PCMM) is a web-based application that assists VA facilities in implementing and monitoring patient and staff assignments in both primary care and non-primary care teams. Teams are groups of staff members organized for providing the Veteran patient continuous and quality care. Its main functions include the ability to:

- Set up and define a team
- Assign positions to a team
- Assign staff to a position within a team
- Assign patients to a team
- Assign patients to a practitioner within a team
- Reassign patients from one team to another team.

This PCMM User Guide provides detailed information to assist Clinical Information Support System (CISS) site staff members and other users in the use of CISS and PCMM. CISS is the web portal that hosts the PCMM application.

The PCMM documentation is located on the VA Software Document Library (VDL) Web site.

System Requirements

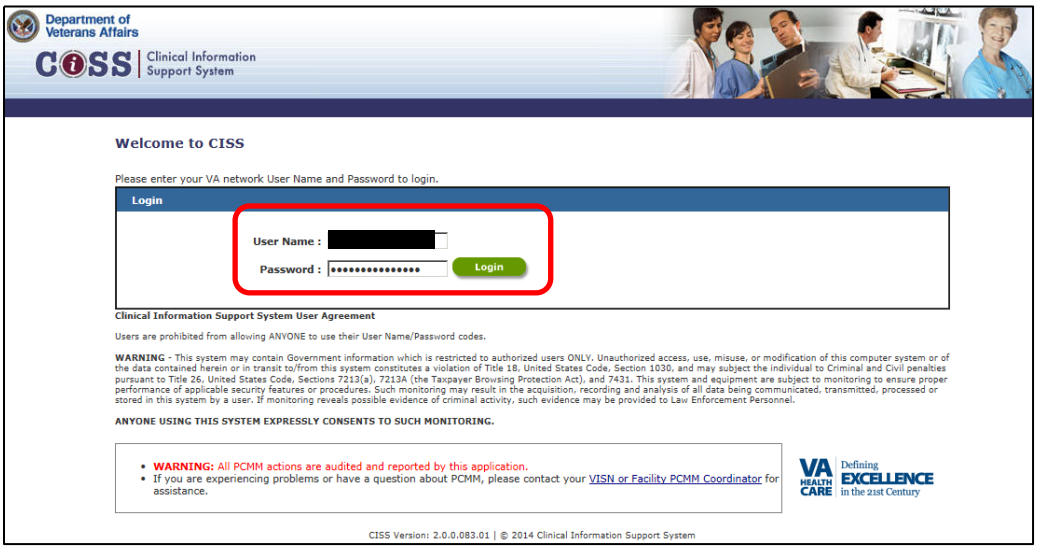
To use the CISS application, you must have:

- Access to the Veterans Health Administration (VHA) Intranet via Microsoft Internet Explorer version 6.0 or higher, with Service Pack (SP) 2.
- Standard 128-bit encrypted security (SSL) implemented on your computer - your system administrator can help if you do not know how to install it.
- Flash Player 10.2 (minimum) or higher installed on your computer; if you do not have it installed, a message displays, instructing you to contact your Information Resource Management (IRM) point of contact to get the correct version of Flash Player installed.
- An authorized user account in the VA LDAP.
- Have VistA Patch SD*5.3*620 installed to extract data from Production VistA to perform data migration, reconciliation and validation
- Installation of VistA patches and updates SD*5.3*620, SD*5.3*603 and OR83.0*387 into accounts.
- VistA link connections in account.

Log into CISS

To log into CISS, you must be authorized to use the CISS Web application.

1. In the appropriate text boxes, enter your VA network user ID and password in the CISS log in window.
2. Click the **Log in** button to display the CISS home screen.



If you need access to this application or need to reset your password, please log a ticket with the Remedy Help Desk by calling 1-888-596-4357.

CISS Home Screen

This screen describes the Clinical Information Support System (CISS) and allows you to log into the PCMM application.

- If you enter the same username/password 3 consecutive times and it is invalid 3 consecutive times, the account will be locked. Contact your VA Administrator for password reset.

Note: You must have the appropriate security privileges to access PCMM, or the PCMM button does not display on the CISS home screen.

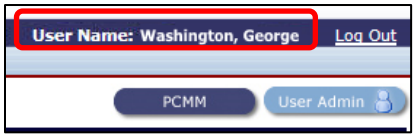
Log into PCMM

1. On the CISS home screen, click the **PCMM** button in the upper right corner to display the PCMM home screen.

   - **Note**: You must have the appropriate security privileges to access PCMM, or the PCMM button does not display on the CISS home screen. Please contact your PCMM Coordinator. Note that a Certificate of Training must be completed prior to access being granted.

2. Depending on your user role and the stations you are authorized to see, you will see the PCMM home screen or a station drop-down menu.

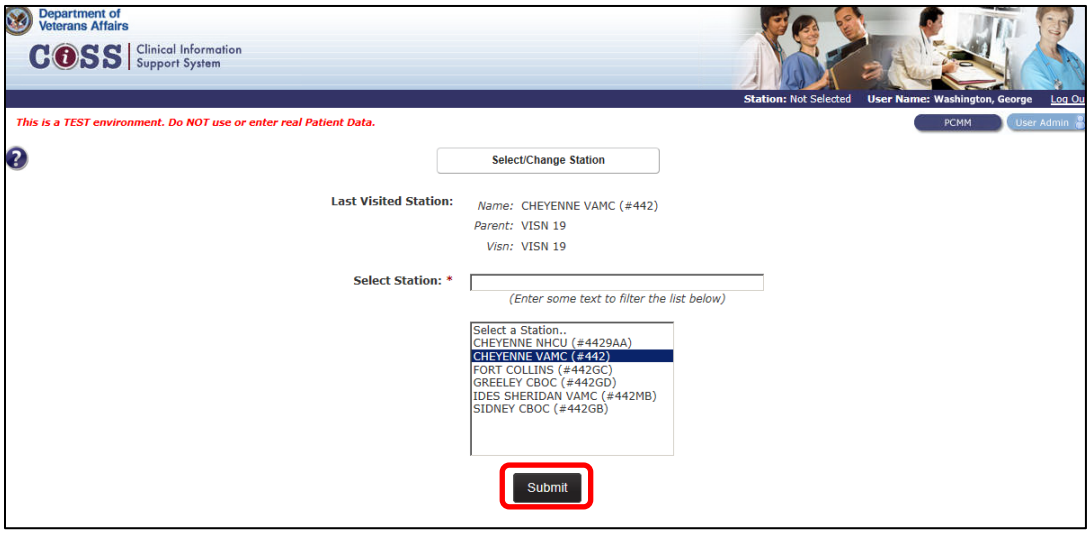
   - Your user name will always appear in the User Name portion of the application header.



   - Once a station is selected or defaulted, the station name and number of the station you are working in will appear in the Station portion of the application header. The system will use the data for that station in all subsequent functions. The parent station for the station will appear in the Parent portion of the application header.

   - If you are only authorized to work at a single station, the system will default to that station and the station name along with its parent will appear in the application header. You will be able to see data only for that one station.

- If you are authorized to work at multiple stations, you will see a drop-down menu with a list of your authorized stations. You must select one station from the list and the system will then display the name of the station you are working with in the application header. Click **Submit** when finished.



The PCMM navigation menu will be filtered for those actions that you are authorized to perform. The system will store your VA name and the date and time that you accessed the system for audit purposes.

If you need access to this application or need to reset your password, please log a ticket with the Remedy Help Desk by calling 1-888-596-4357.

If you are not allowed to access PCMM, you are automatically directed to the CISS Home Page, and be provided information on what you need to do to get access.

Note: If screen display issues occur when working in PCMM, enable Compatibility Mode in the browser. This issue may occur in Internet Explorer browsers. To manually enable the setting, open PCMM in Internet Explorer and click the **Tools** button and then click **Compatibility View** settings. Under Add this website, enter the PCMM URL site to add to the list and click **Add**.

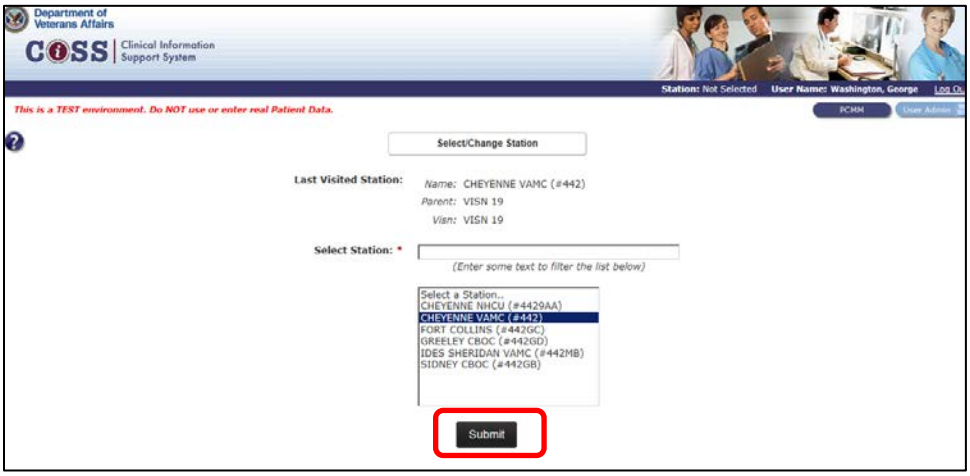
See Also:

- Select or Change a Station
- Log Out of PCMM
- Log In Lockout
- Automatic Timeout

Select or Change a Station

1. Select **Change Station** from the main menu to display the *Select/Change Station* screen.

2. Select a station from the drop-down menu.
3. Click **Submit**.



See Also:

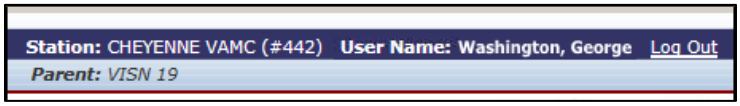
Log into PCMM

PCMM Home Screen

The PCMM home screen contains these areas:

The Context Bar

The dark blue banner at the top of the screen shows your duty station, user name, and a log out link. The Parent VISN, if the station has a parent, is shown in the light blue banner just below. If the station does not have a parent, the VISN number will display.



Application Buttons

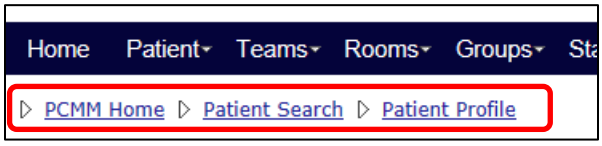
The buttons shown below the banner are links to the applications that you have permission to use. If you are an administrator, you can sign into PCMM without selecting a duty station, until you begin performing application functions.

The Menu Bar

The menus across the top of the screen allow access to functions that you can perform, according to your role.

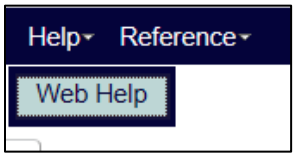
The Bread Crumb Trail

As you navigate through the application, the names of screens will appear at the top left of the screen to show your location in the application. You can click the screen names to go to that location.



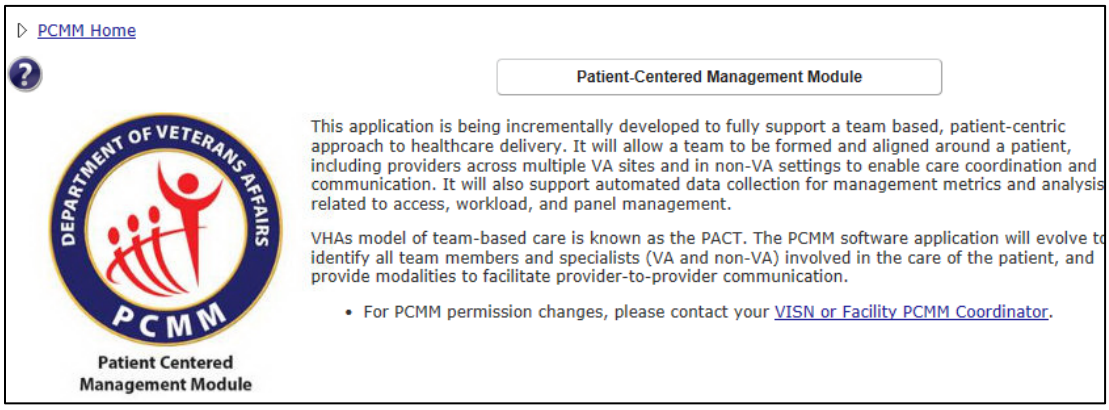
The Help Button

Clicking the blue **Help** button on each screen will display help that is specific to that screen. To access the Table of Contents for the entire help file, click **Help** > **Web Help** from the main menu. There is also a bread crumb trail at the top of the window that shows the location of the current help topic in the larger help file.



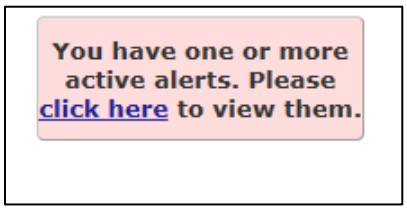
The Content Area

This section of the window has explanatory text, and where all input, viewing, and PCMM tasks are performed.



The Alerts Box

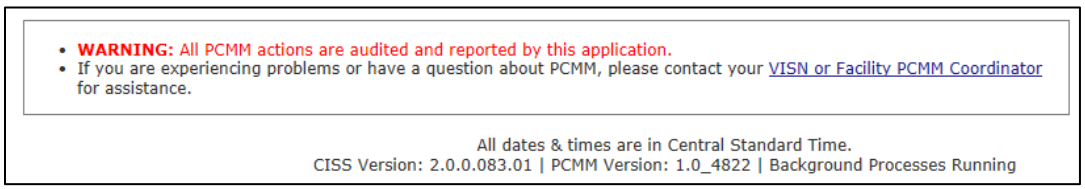
You will receive messages in this box if you have pending alerts.



The Footer

This area at the bottom of every application screen contains:

- PCMM Audit Warning
- Contact information for questions or problems,
- the application version and
- the copyright date



PCMM Icons

The following table describes the icons used in the PCMM interface.

Icon	Meaning	Page Location Example
	Open file	Completed Reports List
	Save As	Completed Reports List
	Run a Report	Reports List
	Permanently Delete Report	• Position List • Group Lists • Completed Report List
	View Team Positions	Team List
	Reassign/Add	• Team Profile The green icon is used to select an auto inactivation date for a team assignment.
	Edit/View Information	• Patient Profile • Position List • Modify an Existing Position • Open Alerts List
	Unassign/Remove	• Patient Profile • Modify an Existing Group • Open Alerts List
	View list of alerts	Alerts Summary
	Add a Comment	Open Alerts List
	View selected item	Model Panel Size Calculation
	View information	The information button icon is used when information on a page cannot be edited, but can only be viewed.
	Edit	The edit icon is used when information on the page can be edited.
120	View Patient Inactivation	The Scheduled Inactivation Date is between 91 - 120 days
90	View Patient Inactivation	The Scheduled Inactivation Date is between 61 - 90 days

60	View Patient Inactivation	The Scheduled Inactivation Date is between 31 - 60 days
30	View Patient Inactivation	The Scheduled Inactivation Date is between 1 - 30 days
	Email	E-mail staff member if an e-mail address is associated with the record.
	Select an item	• Search for a Group • Search for Room • Search for a Staff
	Edit an Entry	Edit a Preceptee assigned

Log Out of PCMM

1. Click the **Log Out** link on the top right side of the screen.

2. A confirmation message is displayed. Click **OK** to confirm or **Cancel** to remain in the system.

Note: The system will log you out if you engage in no system activity for 15 minutes.

See Also:

- Log into PCMM
- Log In Lockout
- Automatic Timeout

Automatic Timeout

The system automatically logs you out after 15 minutes of inactivity. A warning message displays, counting down from 60 seconds until you are logged off the application.

You may click the **OK** button to stop the count-down and continue working. Be aware that if the system automatically logs you off, your work is not saved.

See Also:

- Log Out of PCMM
- Log into PCMM
- Log In Lockout

Log In Lockout

After three unsuccessful attempts to log in with incorrect password or user ID, the system will lock you out. Please contact your CISS System Administrator for a password reset.

See Also:

- Log Out of PCMM
- Log into PCMM
- Automatic Timeout

Help With Error Messages

If the application gives you an error at the time you log on or if you receive error messages that are NOT part of data entry (e.g., if you receive a system error message), you can contact the VA Service Desk to log a Remedy ticket:

- [redacted]
- [redacted]

If you have the knowledge and access, you may log a Remedy ticket yourself.

Please note the steps you had taken up to the point you received the error and capture a screen print to store with the ticket.

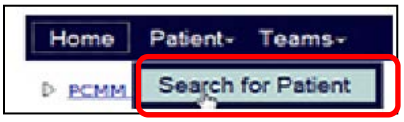
PATIENT MANAGEMENT

Search for a Patient

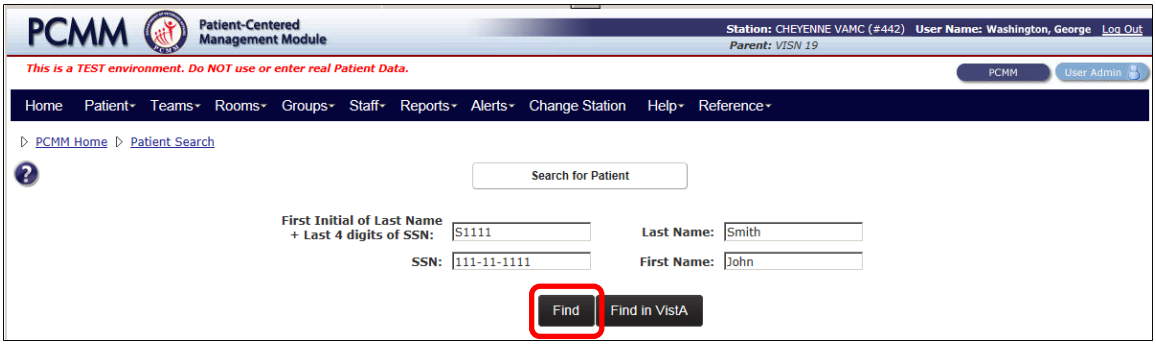
When searching for a patient, you can only view patient information on a need-to-know basis. What patient information you are allowed to view is based on your role. Typically, you are restricted to viewing patient information only for those patients assigned to the station or stations that has/have been assigned to your User ID.

- **Note:** An employee cannot view their own data.

1. From the **Patient** drop-down menu, select **Search for Patient** to display the *Search for Patient* screen.



2. Enter information into the fields and click **Find** to display the patient information or a list of patients in the lower part of the screen that match the search criteria. You can search by entering as much of the information as you know:
   - The first initial of the last name, plus the last 4 digits of a social security number
   - Social Security number (complete in xxx-xx-xxxx format)
   - Last Name
   - First Name



Note: You must enter at least the first initial or last 4 digits of SSN, last name, first name OR full SSN to execute a Patient Search.

- If patient record is labeled as Sensitive Patient, the SSN and DOB are masked
- If the system returns more than the maximum number of records allowed, the complete list of records will not display. You can filter the search criteria further (described below), or search for the patient in VistA.
- The system will display the *Perform Batch Actions* button at the bottom of the search results list. See the *Perform Batch Actions for Patients* section.

If the system cannot find a patient:

1. If the system cannot find a patient that matches the criteria you entered, you will get the following message: “No matches found for the criteria entered. Validate or expand your search criteria.” Click **Close** to exit out the message box. The system will display an additional **Find in VistA** button. VistA requires at least three letters of the last name, OR the full SSN, first name, and Date of Birth to perform a search. Enter the search criteria and select the **Find in VistA** button.
2. The screen will refresh with the VistA results displayed. If no records match criteria, a message will display. Validate or relax your search criteria and try again.
3. Select the VistA patient you wish to work with by selecting the **Name** link which navigates to the Patients Profile screen.
4. Once a patient is selected, the system will check to see if the patient is:
    - A known patient to PCMM for the local station (no further action is required
    - A new patient to PCMM
5. PCMM will display the patient’s Last Name, First Name, Middle Name, Suffix, Gender, SSN, DOB, DOD, Street and City. If the patient record cannot be imported into PCMM, a message will display.
6. Choose **Select** to validate the patient record; the *Patient Profile* is displayed.

Note: Once a patient is pulled into PCMMR from VistA, the patient will no longer appear in the VistA search results, only in the PCMMR search results. The patient will not appear in both search results lists.

See also:

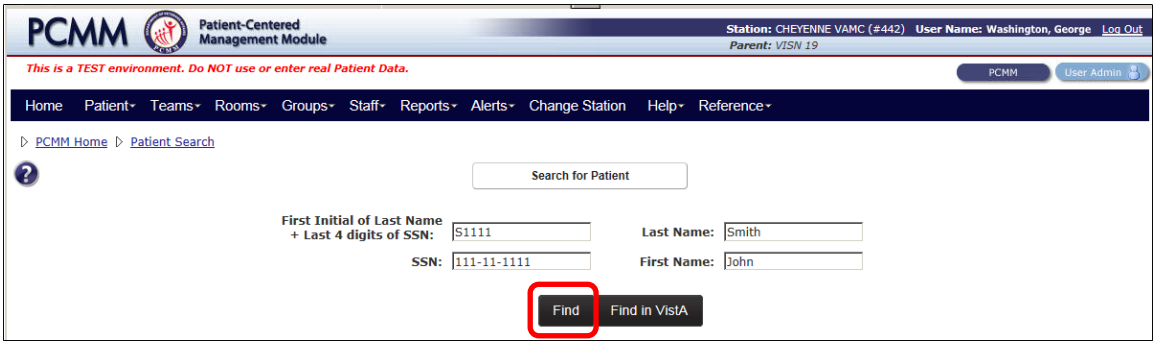
- Perform Batch Actions for Patients
- View a Patient Profile
- Assign a Patient to a Team
- Un-assign a Patient From a Team

View a Patient Profile

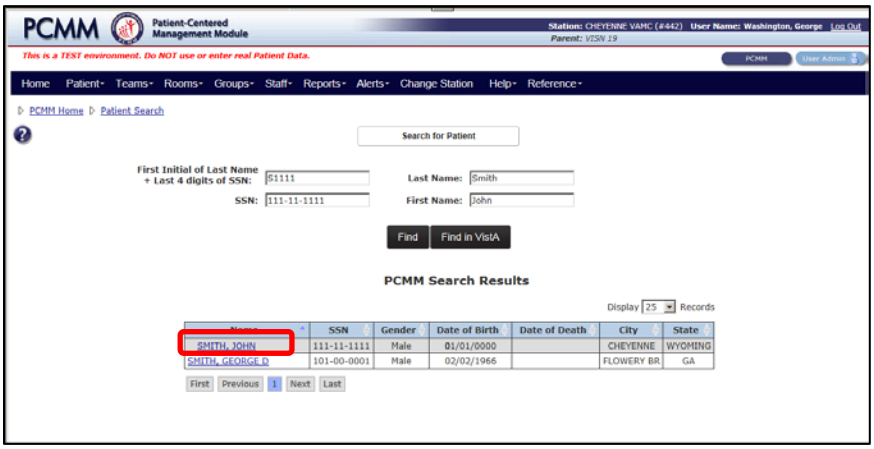
You can view a patient's profile on the *Patient Profile* screen. To access the *Patient Profile* screen:

1. From the **Patient** drop-down menu, select **Search for Patient** to display *the Search for Patient* screen.

2. Enter the necessary data to narrow your search and click **Find** to display the patient information or a list of patient names.



3. Click on a patient name to display the *Patient Profile* screen. See the *Search for a Patient* section for more information.

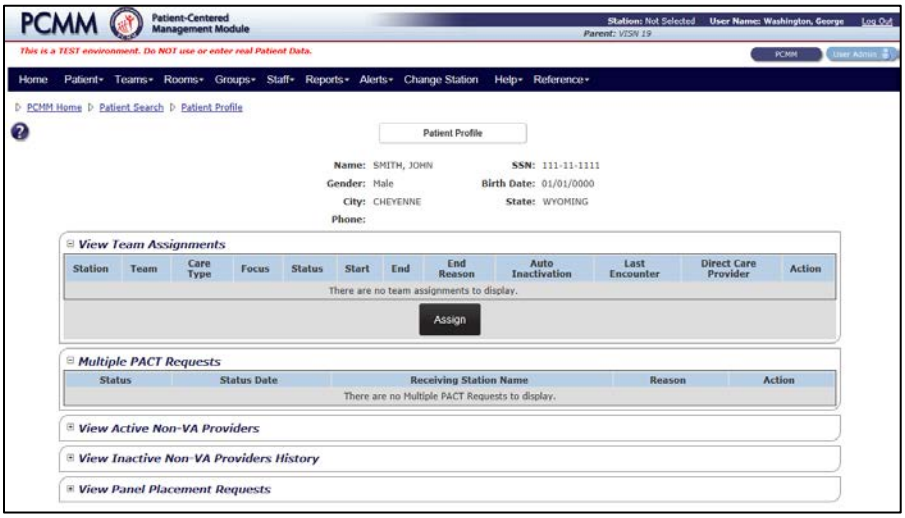


The Patient Profile screen displays:

- Patient Demographics
- Team Assignments for the Patient
- Multiple Primary Care Provider Requests
- Active non-VA Providers
- Inactive non-VA Providers History
- Panel Placement Requests

From this screen, you can:

- Assign, and Un-assign a Patient to or from a team (if you have permission)
- Update/Review a Patient's Multiple PCP Requests
- View/Search for an active non-VA providers
- View/Create PACT Panel Requests



See also:

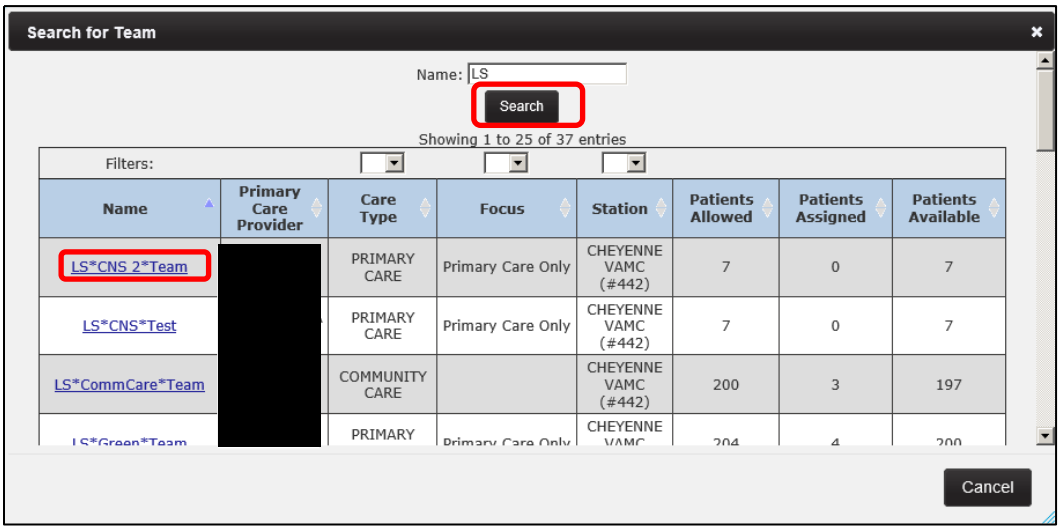
- Assign a Patient to a Team
- Un-assign a Patient From a Team
- Update/Review a Patient's Multiple PCP Requests
- PACT Panel Placement

Assign a Patient to a Team

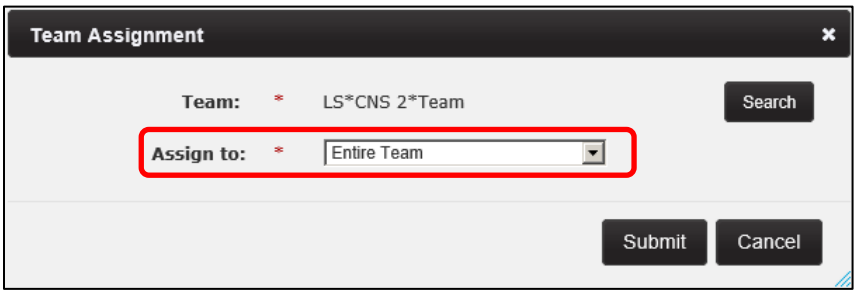
A patient can be assigned to a team from the Patient Profile screen.

1. From the *Patient Profile* screen (*See the* View a Patient Profile *section*), click the **View Team Assignments** toggle link at the bottom of the page to display a list of teams to which the patient is assigned or has been un-assigned.
2. Click the **Assign** button to display the *Team Assignment* dialog box.

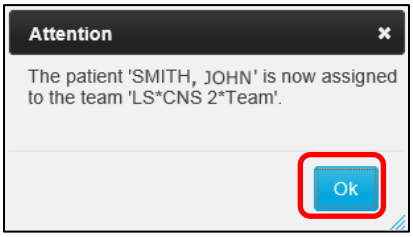
3. Click the **Search** button to display the *Search for Team* window (*See the* Search for a Team by Name *section)*, and select a team.



4. Accept the default current date or enter a date for the **Effective Date** field. The effective date must be greater than the team's *Active Date* and cannot be a future date.
5. Choose **Entire Team** if the patient is assigned to a team with a purpose of Primary Care, as they can only be assigned at the team level. If the patient is assigned to a team with a purpose other than Primary Care, the system will display current and active PCP or Associate Providers. Choose an **Assign to:** selection to assign the patient to a team member.



6. Click **Submit** to assign the patient to the team. A confirmation message will appear if the assignment was successful. Click **OK** to continue.



7. For Primary Care teams, the patient assignment will have a status of *Pending* until the patient has had an encounter. The *Effective Date* will default to the current date/time the assignment was entered. For all other care types, the initial status will be *Active*. The *Effective Date* will be the date entered during the assignment.

   - A patient with a Date of Death (DOD) is not allowed to be assigned to a team.
   - A patient status will be *Pending* when assigning to a PACT team, and remain pending until there is a patient encounter with any member of the PC Teamlet. At that point, the patient status becomes *Active*. If the patient is assigned to a non-PACT team, the patient status will always be *Active*.
   - The patient's PACT assignments will be evaluated enterprise wide to determine if an active PACT assignment exists in another 3-digit code station. See the Multiple PACT Requests section for more information.
   - A patient can be assigned to more than one non-primary care team.
   - The assignment will occur at the *Team* level. All active positions on the team will inherit the team assignment regardless of whether it is staffed or not, except in the case of a team with a Purpose of *Primary Care*. Then the PCPs and/or Associate Providers on the team will be shown and you will be able to select current and active PCP or Associate Provider for patient assignment.
   - The Assignment Effective Date is defaulted to the current date and will allow you to override it, but not prior to the team's creation date or last team discharge date, whichever is latest.

- If the team is closed, assignment is not allowed. Teams Closed for Assignment will not appear in the Team Search results list.
- If the team has reached its allowed patient capacity, a warning message states that the allowed patient capacity has been reached and the assignment can continue.
- If the team has reached its overridden maximum patient capacity, a warning message will be displayed to let you know the maximum allowed patient capacity has been reached and the assignment can continue.

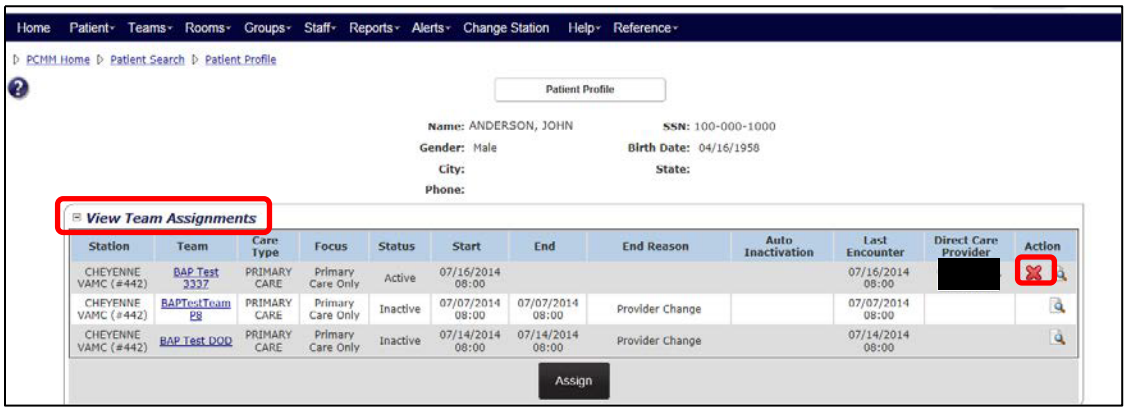
See also:

- Search for a Patient
- View a Patient Profile
- Un-assign a Patient from a Team
- Multiple PACT Requests
- Auto-Inactivation for a Team
- Inactivation of a Patient from a Team

Un-assign a Patient from a Team

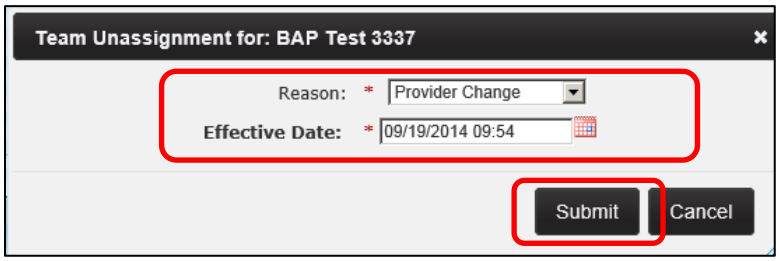
A patient can be un-assigned from a team from the Patient Profile screen.

1. From the *Patient Profile* screen (*See the* View a Patient Profile *section*), click the **View Team Assignments** toggle link to display a list of teams to which the patient is assigned or has been un-assigned.
2. Click the *Un-assign Patient from a Team* icon (red "X") in the **Actions** column to display the *Team Un-assignment for:* Team name dialog box. (Hold your mouse cursor over the icons to view a description of each icon.) Once clicked, the *Un-assign* dialog box will appear.



3. In the dialog box, select a value from the **Reason** drop-down menu.
4. Either accept today's default date or enter a new date in the **Effective Date** field. The effective date cannot be before the current assignment date and cannot be a past date.

5. Click **Submit** to save the data, or **Cancel** to return to the screen without saving the information.



6. Click **Submit** to display the *Login to VistA* with access/verify codes screen if you have not logged into VistA this session. Enter your access codes in the fields and click **Submit.** Click **Cancel** to return to the previous screens.
7. The system will display a confirmation message. Click **OK** to exit VistA.

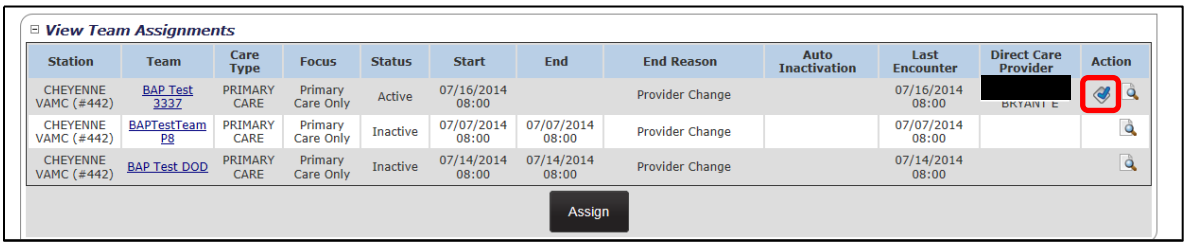
See also:

- Search for a Patient
- View a Patient Profile
- Assign a Patient to a Team
- Reassign a Patient to a Team
- Auto Inactivation of a Patient from a Team
- Inactivation of a Patient from a Team
- Unassign/Transfer Batch Actions for Patients

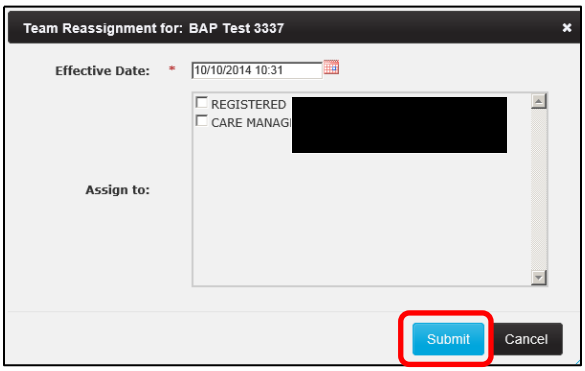
Reassign a Patient from a Team

A patient can be reassigned to a team from the Patient Profile screen.

1. From the *Patient Profile* screen (*See the* View a Patient Profile *section*), click the **View Team Assignments** toggle link to display a list of teams to which the patient is assigned, been un-assigned or reassigned.
2. Click the *Re-Assign Patient from a Team* icon in the **Actions** column to display the *Team Reassignment for: Team* name dialog box. You can hold your mouse cursor over the icons to view a description of each icon. Once clicked, the **Reassign** dialog box will appear.



3. Either accept today's default date or enter a new date in the **Effective Date** field. The effective date cannot be before the current assignment date and cannot be in the past.
4. Choose **Entire Team** if the patient is assigned to a team with a purpose of *Primary Care*, as they can only be assigned at the team level. If the patient is assigned to a team with a purpose other than Primary Care, the system will display current and active PCP or Associate Providers. Choose an **Assign to:** selection to assign the patient to a team member.



5. Click **Submit** to save the data, or **Cancel** to return to the screen without saving the information.
6. Click **Submit** to display the *Login to VistA with access/verify codes* screen if you have not logged into VistA this session. Enter codes in the fields and click **Submit**. You may click **Cancel** to return to the previous screens.
7. The system will display a confirmation message. Click **OK** to exit VistA.

See also:

View a Patient Profile

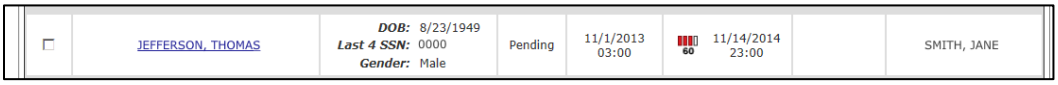
Auto Inactivation of a Patient from a Team

Patients must have been established and have active assignments to Primary Care teams to be eligible for Auto Inactivation. A patient's assignment status to a team will be inactivated automatically by the system in the following circumstances:

1. Due to Inactivity:

    - For each patient that has an active team assignment with a Care Type = "Primary Care", the system will check when the patient had his last encounter with any member of the PACT teamlet (i.e. the Primary Care Provider, Associate Provider, Nurse Care Manager, Clinical Associate, Administrative Associate) and will use that last encounter date as follows:
    - Patients must have been established and have active assignments to teams to be eligible to have their Last Encounter Date with that team recorded.
    - When a patient has been identified for auto inactivation, the selected date will be displayed in the View Team Assignments table.

- Icons will display the amount of days before the patient will be auto inactivated:
- If the Scheduled Inactivation Date is between 91 - 120 days from today, then the 120 day icon with the date will display.
- If the Scheduled Inactivation Date is between 61 - 90 days from today, then the 90 day icon with the date will display.
- If the Scheduled Inactivation Date is between 31 - 60 days from today, then the 60 day icon with the date will display.
- If the Scheduled Inactivation Date is between 1 - 30 days from today, then the 30 day icon with the date will display.



- When a patient dies who is assigned to a team, the patient record is automatically moved from the Current Assignments list to the Staff Assignment Timeline list.
- If the patient has never had an encounter with any member of his PACT team within 8 months (i.e. 120 days before 12 months) from assignment to the team OR if he has had at least one previous encounter but has not had another within 20 months (ie.120 days before 24 months) from assignment to the team; the system will schedule the patient for automatic inactivation and send out a MailMan message.
- If the Scheduled Inactivation Date is within 120 days of the current date, PCMM will send out an alert stating that the Patient will be automatically be inactivated in 120 days unless he has an encounter with a member of the PACT team or is extended by a PCMM user. When the date the patient is scheduled for inactivation arrives, and the patient is not extended or does not have an encounter with a member of the PACT teamlet, he will be automatically unassigned from his current PC team and position assignments with a status of “Automatically unassigned due to Inactivity”.
- If Date Flagged for Inactivation had been previously recorded and a subsequent visit occurred before the position and the team were unassigned; the Date Flagged for Inactivation, Scheduled Inactivation Date, Extend Auto Inactivation reason, extension comments and the Status will be removed.

2. Automatic Inactivation due to Date of Death recorded for a patient:

- When a Date of Death is recorded for a patient, he will be automatically unassigned from his current PC team and position assignments with a status of *Automatically unassigned due to death*. The system will send out the Automatically Inactivated Death alert) stating that the Patient has been automatically inactivated.
- When a Date of Death is rescinded for a patient he will be automatically reassigned to his current PC team and position assignments. The system will retrieve this data and populate the Position and Team Assignment Date on the PCMM Patient Team Assignment file and the Patient Provider Relationship (if needed) file. The date the patient was reassigned to the team will be recorded and displayed in PCMM.

See also:

Assign a Patient to a Team
Un-assign a Patient from a Team
Inactivation of a Patient from a Team

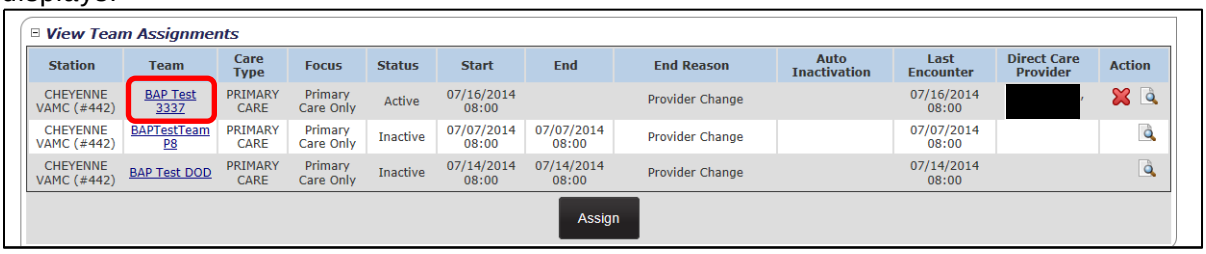
Inactivation of a Patient from a Team

A patient's assignment status to a team can be inactivated by setting an inactivation date and reason. This can be done from three locations in the application.

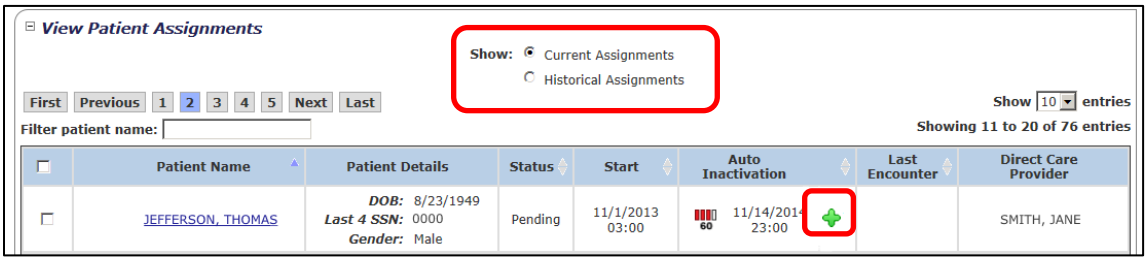
From the Patient Profile Screen:

From the *Patient Profile* screen, you are viewing the patient profile (*See the* View Patient Profile *section*).

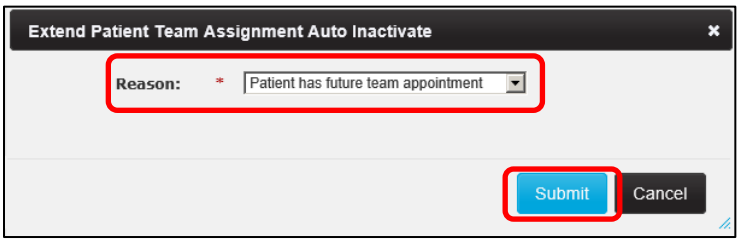
1. Click the **View Team Assignments** toggle link to display a list of teams to which the patient is assigned. Click the **Team** name. The Modify an Existing Team screen displays.



2. Verify that the **Show: Current Assignments** radio button is selected (it is by default) and that *Auto Inactivation* is available (See comments below).
3. Locate the Patient and click the **patient** name. The Patient Profile displays. Select the green plus sign (**+**) displayed at the end of the Auto Inactivation date for a team assignment. Verify that the Auto Inactivation date is equal to 183 days from the current date.



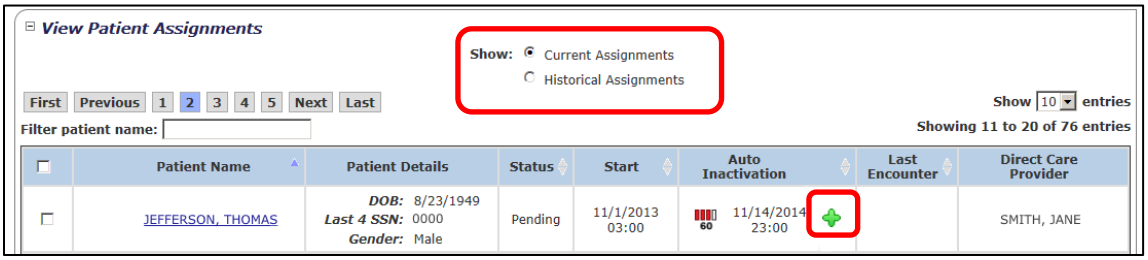
4. The *Extend Patient Team Assignment Auto Inactivate* popup window will display. Choose a reason from the drop down list and click **Submit**, or **Cancel** to cancel.



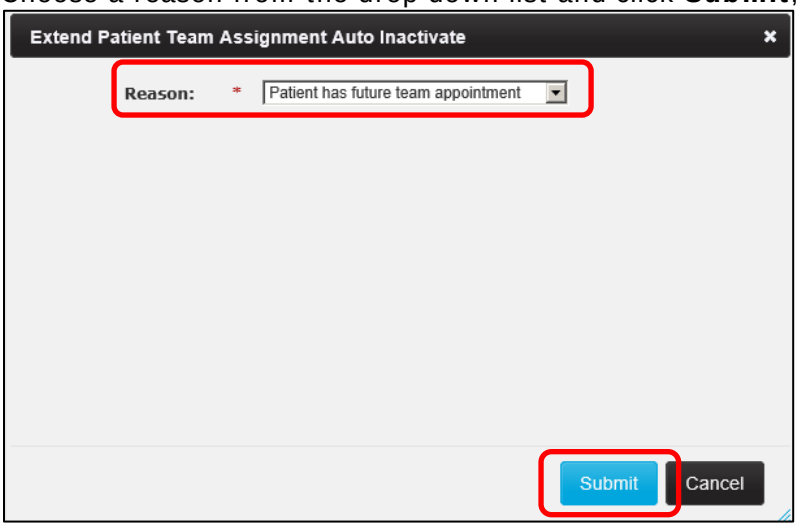
From the Team Profile Screen:

From the *Modify an Existing Team* screen, you are viewing the team profile (See the *Search for a Team by Name* section).

1. Click the **View Patient Assignments** toggle link to display a list of teams to which the patient is assigned.
2. Verify that the **Show: Current Assignments** radio button is selected (it is by default) and that *Auto Inactivation* is available.
3. Select the green plus sign (+) displayed at the end of the Auto Inactivation date for a team assignment. The *Auto Inactivation* date will be equal to 183 days from the current date.



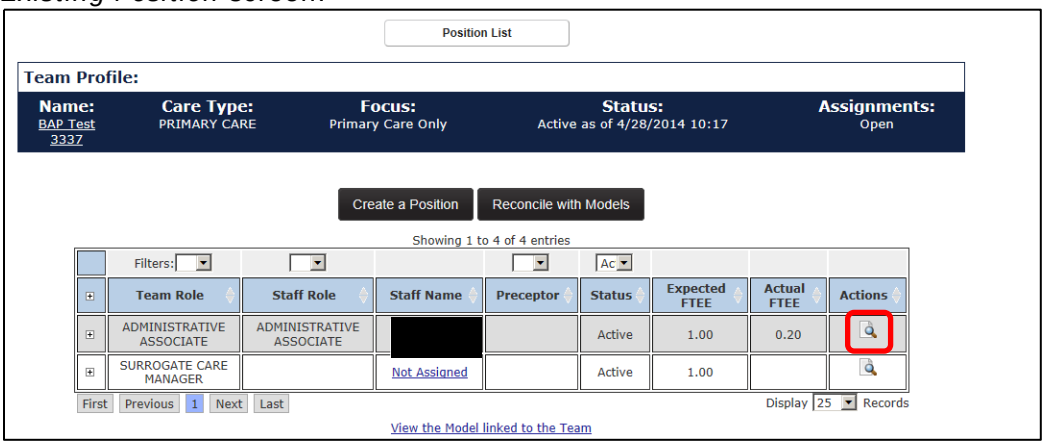
4. The *Extend Patient Team Assignment Auto Inactivate* popup window will display. Choose a reason from the drop down list and click **Submit**, or **Cancel** to cancel.



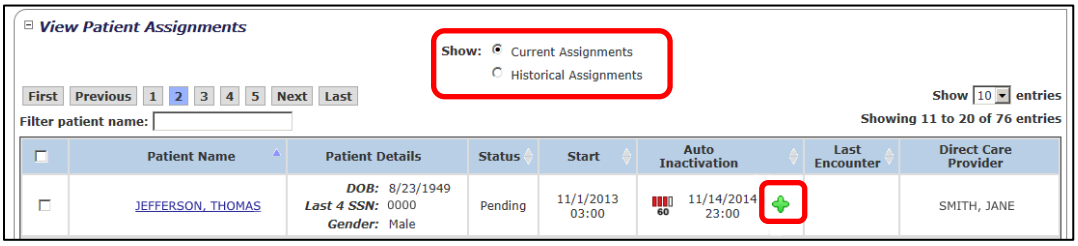
From the Position Profile Screen:

From the *Modify an Existing Position* screen, you are viewing the team profile (See the *Modify a Position Profile* section).BP

1. Click the *View Positions & Staff Assignments* link to display the *From the Position List* screen for the team the patient is assigned to (see *Modify an Existing Position* section), choose a **Team Role** and click on the **Actions** icon to display the *Modify an Existing Position* screen.



2. Click the **View Patient Assignments (+)** sign.
3. Verify that the **Show: Current Assignments** radio button is selected (it is by default) and that **Auto Inactivation** is available.
4. Select the **green plus sign (+)** displayed at the end of the *Auto Inactivation* date for a team assignment. The *Auto Inactivation* date will be equal to 183 days from the current date.



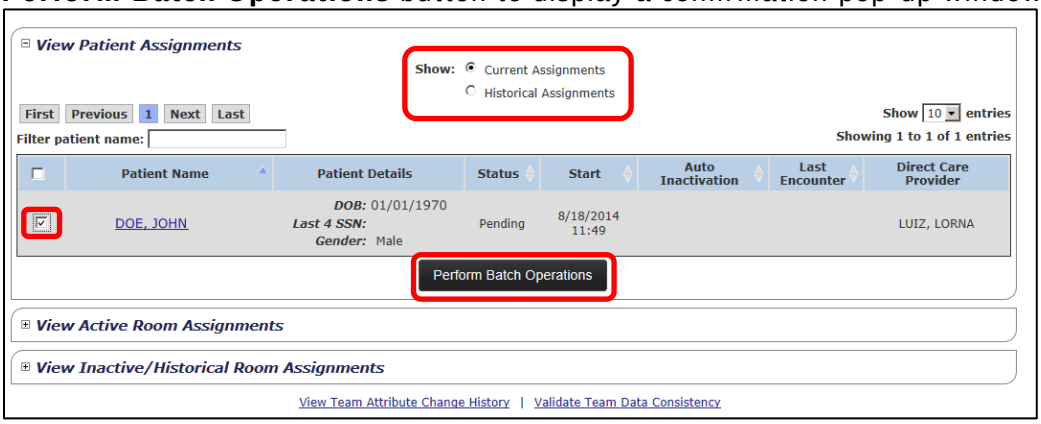
5. The *Extend Patient Team Assignment Auto Inactivate* popup window will display. Choose a reason from the drop down list and click **Submit**, or **Cancel** to cancel.

See Also:
Auto Inactivation of a Patient from a Team
Assign a Patient to a Team
Un-Assign a Patient to a Team

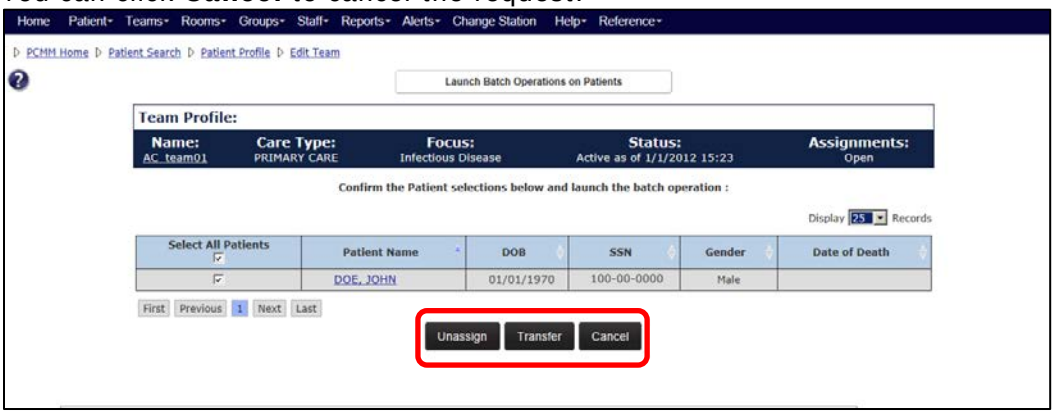
Un-assign / Transfer Batch Actions for Patients

You can transfer or un-assign one or more patients to/from a team (both Primary Care and non-Primary care) using a batch process. Patient records containing a date of death (DOD) cannot be transferred/unassigned.

1. From the *Modify an Existing Team* screen (*see* Search for a Team by Name *section*), expand the **View Patient Assignments** section at the bottom of the page.
2. Choose **Show: Current Assignments** (default) or **Historical Assignments** (for reassignment).
3. Ensure the desired patients are selected in the **Patient Name** column, and click the **Perform Batch Operations** button to display a confirmation pop-up window.

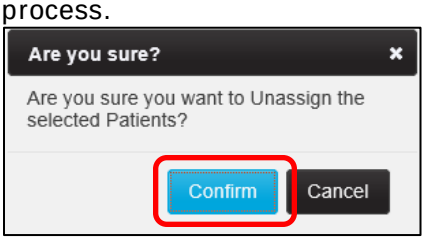


4. Click **Unassign** for unassignment or **Transfer** for transferal of the selected patients. You can click **Cancel** to cancel the request.

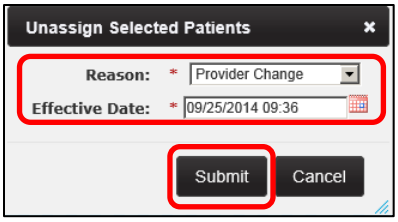


- If Unassigning Patients:

5. If unassigning patients, a pop-up window will display. Click **Confirm** to continue the process.



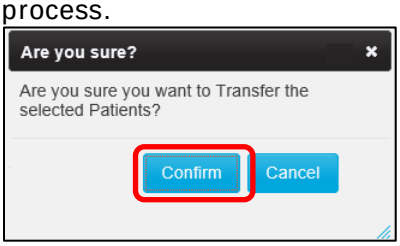
6. If unassigning patients, the **Unassign Selected Patients** pop-up window will display. Please select a reason from the drop down box and enter an **Effective date** (if different than the current date/time which is the default) and click **Submit**.



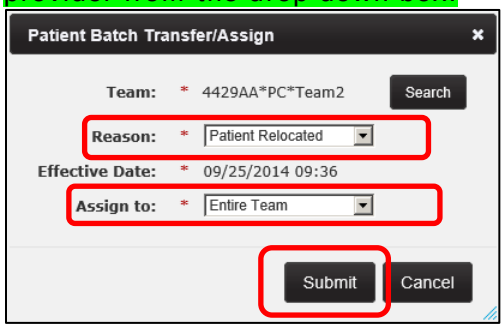
7. Click **Submit** to display the *Login to VistA with access/verify codes* screen if you have not logged into VistA this session.
8. The system displays *Status of the Batch Operation Requested on the Patients* screen. A confirmation message will display. Check your alerts to view the status of the batch job.

- If Transferring Patients:

9. If transferring patients, a pop-up window will display. Click **Confirm** to continue the process.



10. If needed, search for the team to transfer the patient.
11. Please select a reason from the drop down box, enter an **Effective date** (or current date/time is displayed.
12. Please select a whether the patient is assigned to an entire team or an associated provider from the drop down box.



13. Click **Submit** to display the *Login to VistA with access/verify codes* screen if you have not logged into VistA this session.
14. The system displays *Status of the Batch Operation Requested on the Patients* screen. A confirmation message will display. Check your alerts to view the status of the batch job.

See also:

Search for a Team by Name
Result of Batch Job Execution

Multiple PACT Requests for Patient

A patient can be assigned to multiple stations to facilitate and expedite encounters for that patient, especially if it's medically necessary or if a Veteran relocates. You are able to view all requested assignments for Multiple PC teams for a patient on the Patient Profile screen. There can only be one active request per patient per station at a time. There can be multiple requests for the same patient at different stations at one time.

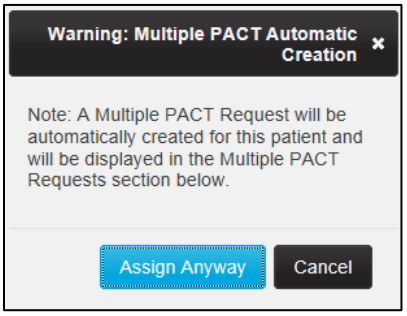
Note: *Multiple PACT requests and Multiple PCP requests refer to the same process - they are interchangeable terms.*

- If there are no active PC Assignments for this Patient at other stations, the multiple PACT request cannot be created.
- Generation of a multi-PACT request will be auto-generated. Only through the assignment of a pending or assigning a patient to a pending status to a new team will it auto-generate the multiple PACT request, if needed.

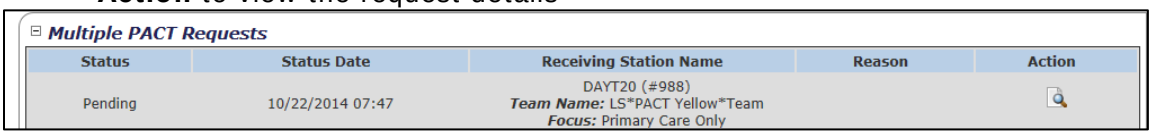
When a patient is being assigned to a PACT team at the local station, the patient's PACT assignments will be evaluated enterprise-wide to determine if an active PACT assignment exists in another 3-digit code station. If it is determined that the patient has one or more active PACT assignment(s) at other 3-digit code stations, then the system will automatically generate a Multiple PACT Request (MPCP) for the current pending PACT assignment being made.

- There can only be one pending request per patient per 3-digit code station at a time. The Multiple PACT request cannot be used to request an assignment within the same 3-digit code station.
- There can be multiple requests for the same patient for different 3-digit code stations at one time.
- In order to create/edit a Multiple PACT request for a patient, the patient must not have a Date of Death associated with him. If he does have a Date of Death, a Multiple PACT request will not be created.

1. The Multiple PACT request process starts when a patient is being assigned to a PACT team at the local station. See the *Assign a Patient to a Team* section for more information.
2. If the system finds the patient is active at another station, *The Multiple PACT Automatic Creation* popup box will display. Click **Assign Anyway** to continue, or **Cancel** to cancel. The *Attention* popup box will display. Click **OK**.



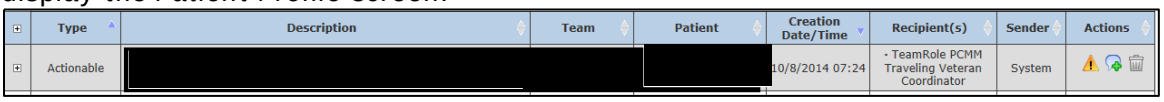
3. The system creates a Multiple PACT request. The *Multiple PACT Request* section in the Patient Profile will contain a table that lists all of the requested assignments for the Primary Care teams and display the following fields:
    - **Status**
        - **Pending** - Default when creating a new request - If all involved stations have not approved or denied the request
        - **Approved** - If all involved stations have approved the request
        - **Denied** - If any of the involved stations have denied the request or
        - **Withdrawn** - If the station needing assignment cancelled the request
    - **Status Date**
    - **Receiving Station Name**
        - **Station Name** (Station #)
        - **Team name**
        - **Focus**
    - **Reason**
        - **Medically Necessary** or **Permanent Relocation**
    - **Action** to view the request details



Multiple PACT Requests

Status	Status Date	Receiving Station Name	Reason	Action
Pending	10/22/2014 07:47	DAYT20 (#988) ***Team Name:*** LS*PACT Yellow*Team ***Focus:*** Primary Care Only		

4. The system sends out two alerts to all involved stations (i.e. those stations holding a current active PACT assignment or the station needing assignment). An *Informational Alert* is sent to the station needing assignment PCMM Coordinator for awareness and an *Actionable Alert* to the Station Needing Assignment TVC requesting to Approve OR Deny an existing Multiple PCP Request.
    - The Travelling Veteran Coordinator (TVC) at site and VISN level along with their backups are the ones that can enter the approval/denial.
    - All involved stations must approve or deny the new pending request in order for the PACT assignment at the requesting station to be considered for activation.
5. The authorized user (TVC) opens the **Alerts** list (*see the* View Open Alerts List for a Current Station *section*), locates the correlating Actionable alert for the request, and clicks the **View / Action on Alerts** icon in the **Actions** column. The system will display the *Patient Profile* screen.

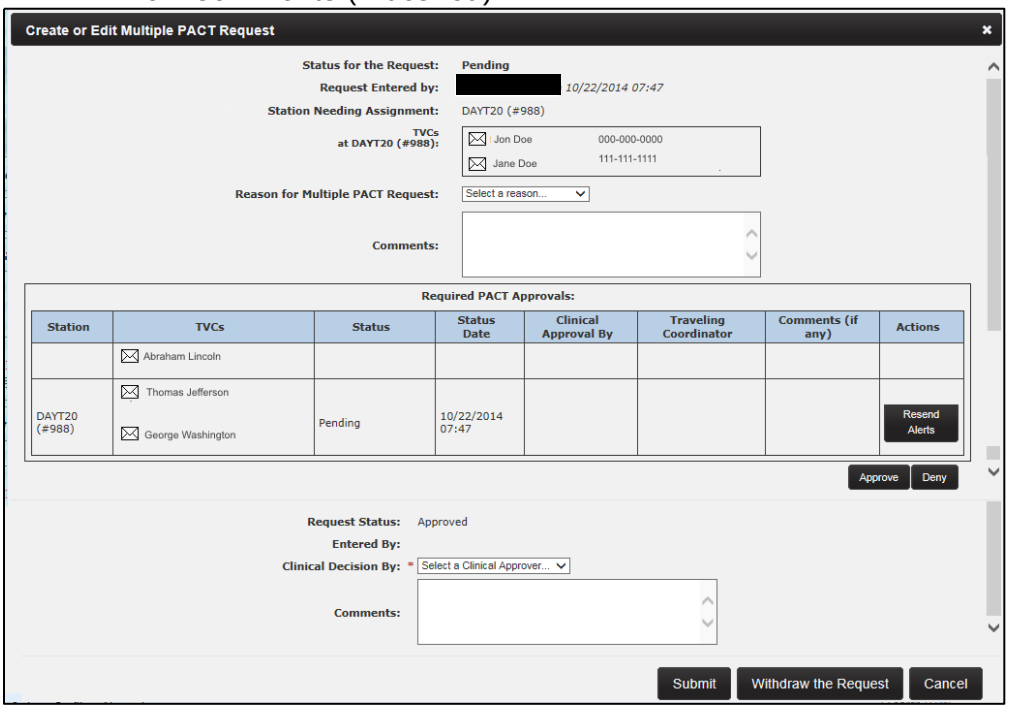


Type	Description	Team	Patient	Creation Date/Time	Recipient(s)	Sender	Actions
Actionable	[redacted]			10/8/2014 07:24	• TeamRole PCMM Traveling Veteran Coordinator	System	

6. From the *Multiple PACT Requests* section, the user clicks the **Actions** icon (magnifying glass) to display the *Create or Edit Multiple PACT Request* popup screen. This screen will display:
    - Status for the Request (will be *Pending*)
    - Request entered by
    - Station Receiving Request
    - TVC's listed for that station
    - Reason for Multiple PACT Request (Medically Necessary or Permanent Relocation)(See note below containing Permanent Relocation information)
    - Comments
    - The *Required PACT Approvals* section will include:
        - Station

- TVC's
- Status-- Not Yet submitted for approval -- for all stations that have an active Team Assignment for the patient (an indicator that receiving station has not provided their approval).
- Status Date
- Clinical Approval By
- Traveling Coordinator
- Comments (if any)
- Actions

- The bottom section of the form will include the *Approval* section:
  - Request status
  - Entered By:
  - Clinical Decision By:
  - Comments (if desired)

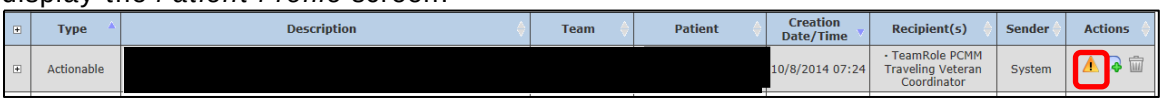


7. Click **Approve** to continue, or **Deny** to deny the requested approval. The status will be changed to Approve, the Entered by will be populated, the Approver selects a **Clinical Decision by:**, and comments may be entered if desired.
8. Click **Submit** to continue, **Withdraw the Request** to withdraw, or **Cancel** to cancel. If *Submitted*, the system changes the Status to **Approved** in the Patient Profile and sends out an alert to the original station.
   - If the TVC denies the request, the pending PACT assignment request will be cancelled and closed with a reason of *Denied*.
   - If the Multi PACT Request is in *Pending* status, ONLY the Station Needing assignment TVC role can WITHDRAW the request. This will send an Informational alert to all station(s) TVC(s) and PCMM Coordinator(s) listed on the request stating that the request is no longer needed. The station needing assignment can cancel the request as long as the overall status of the MPCP request is *Pending*. Even if the station needing assignment has approved the Multi PACT request, that station can still cancel the request if its overall status is still *Pending*.

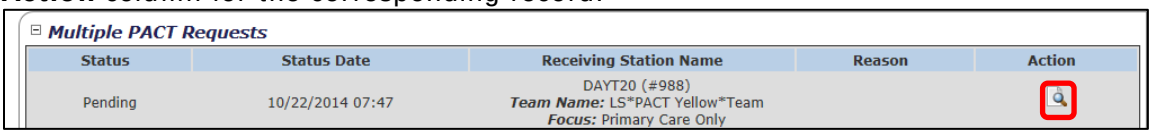
- If a station has a pending assignment that flips to *Active* while a Multi PACT request still has an overall status of *Pending*, this station will be added to the Multi PACT request as a *Required PACT Approver*. The appropriate alerts will be sent to the appropriate people.
- Once the overall status of a Multi PACT request changes from *Pending* to *Approved* or *Denied*, the request will be closed and no further changes permitted. A new request will have to be submitted.

Approve Station Process:

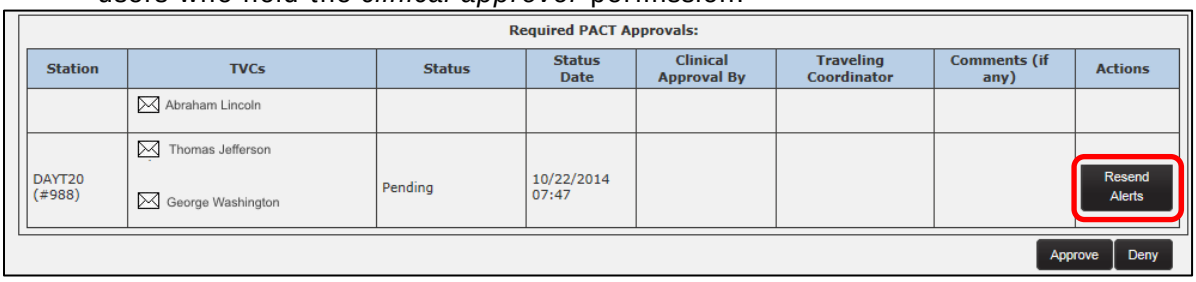
1. The TVC at the receiving station opens the **Alerts** list (*see the* View Open Alerts List for a Current Station *section*), locates the correlating *Actionable* alert for the request, and clicks the **View / Action on Alerts** icon in the **Actions** column. The system will display the *Patient Profile* screen.



2. The TVC opens the **Multiple PACT Requests** section and clicks the icon in the **Action** column for the corresponding record.



3. The system displays the *Multiple PACT Automatic Creation* popup box. The user scrolls down to the Required PACT Approvals section.
4. The TVC has the option of resending the alert to the stations listed by clicking the Resend Alert button in the Actions column.
5. The TVC clicks **Approve** to continue (and may enter comments if desired), **Deny** to suspend the approval process. If **Deny** is selected, the user will be required to select a **Reason** and **Date**.
   - All involved stations must approve or deny the new pending request in order for the PACT assignment at the station needing assignment to be considered for activation.
   - Once a request has been approved or denied – no further edits are permitted.
   - The other involved stations will not be able to edit any data, they will only be able to approve or deny the request.
   - The TVC(s) must enter who made the clinical decision to Approve or Deny the request. This is used to indicate if the TVC is approving this request or on behalf of someone else who authorized the approval from a clinical standpoint. It is a required field. This drop down list will include all PCMMR users who hold the *clinical approver* permission.



6. The TVC clicks **Submit** and the record is saved.
7. The request will be saved with an assignment status of Approved for the station approving the request. The overall status of the request will remain Pending until all required approvals have been obtained. An Informational Alert will be sent to all TVC(s) at the other approving station(s) except the TVC's station that just provided the approval.
    - If the MPCP request is approved by all involved stations being asked to approve/deny the request, the status of the entire request will then be *Approved*. An information alert will be sent to all TVC(s) and PCMM Coordinators.

If TVC Denies the Request:

- The request will be saved with an assignment status of *Denied.* An Informational Alert will be sent to all TVC(s) and PCMM Coordinator(s) at the other approving station(s) except the TVC's and PCMM Coordinator's station that just provided the denial.
- If the MPCP request is denied by one station within all the stations being asked to approve/deny the request, the status of the entire request will then be *Denied*. No further action on this request will be possible by any other approvers whose approval may be pending.

8. The system displays the details of the submitted request in the timeline on the *Patient Profile* screen.
    - The system will track that all approvals needed are received. When they are, the assignment will be interrogated for activation. If an encounter has been recorded within the previous 30 days from the team assignment date; the assignment status will be changed from *Pending* to *Active* using the encounter date as the effective date for the activation.
    - Once a MPCP Request is approved and in *Approved* status, it will be considered valid for 24 months using the Approval date from the last station to submit its approval on the request. If the patient is unassigned from that team and is re-assigned again or if the team itself is inactivated/re-activated in this time period, the earlier approval will be considered 'valid' during this 24 month period.
        - If the 24 month timeframe has passed and a patient is then unassigned from the team, a new MPCP Request is required.
        - If the 24 month timeframe has passed and the patient is still assigned to the team, the original MPCP Request is still considered valid.
    - If a MPCP Request is still Pending 15 days after the request's creation, the system will automatically generate an informational alert to all of the outstanding station approver(s) by sending an Outlook email to remind the recipient(s) to look at the PCMMR Alerts and that action is needed.
        - If a MPCP Request is still Pending 30 days after the request's creation, the system will generate an informational Escalation Alert to the VISN TVC coordinator of each station that has not responded to the MPCP Request by sending an Outlook email stating that a MPCP Request has been pending for 30 days and to look at the PCMMR Alerts to take action on this request.
        - If a MPCP Request is still Pending 45 days after the request's creation, the system will generate an informational Escalation Alert to the PCMMR National Coordinator by sending an Outlook email stating that

a MPCP request has been pending for 45 days and to look at the PCMMR Alerts to take action on this request.

- If a date of death (DOD) occurs for a patient in the station needing assignment while a Multi PACT Request is in Pending status, the system will automatically un-assign the patient from the pending assignment and the Multi PACT Request will be WITHDRAWN. An information alert will be sent to all appropriate people.
    - If the Multi PACT Request already has a status of APPROVED or DENIED or WITHDRAWN, no changes will occur to those requests.
    - If a DOD occurs for the patient at one of the approving stations, the Multi PACT Request will not be affected. (The auto inactivation process of the active assignment at the other station will resolve this issue.)

Permanent Relocation Process:

- If the TVC at the station needing assignment selects **Permanent Relocation** as the reason for the Multi PACT Request, it is to assist the patient with an easy transition to the patient's new station. Once overall approval is received by the station needing assignment, the following alerts will be sent:
    - An informational alert will be sent to all TVC(s) on the request stating the relocation has completed and the request has been WITHDRAWN.
    - An actionable alert will be sent to all PCMM Coordinator(s) on the request stating the relocation has completed; that all Active PACT assignments need to be unassigned at each of the approving station(s); and the request has been WITHDRAWN.

See also:

View a Patient Profile
Assign a Patient to a Team
View Alerts Summary for a Station
View Open Alerts List for a Current Station

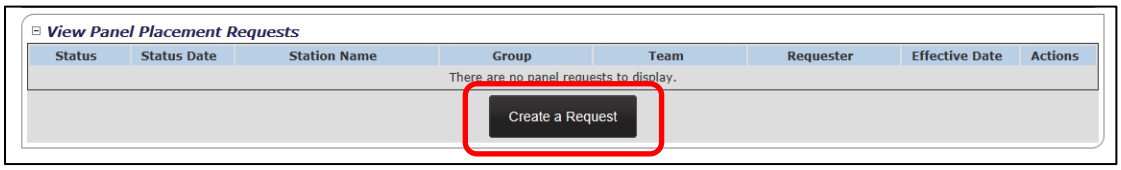
PACT Panel Placement

A request for a patient to be assigned to a PACT Panel can be created from the Patient Profile screen. A PACT Panel Placement must be used within the same 3-digit code station.

- There can be multiple requests for the same patient for different stations at one time. The patient must have an active PACT team assignment at one station before this function can be performed.
- If the patient record contains a date of death, you will not be able to create/edit a PACT Panel Placement request.

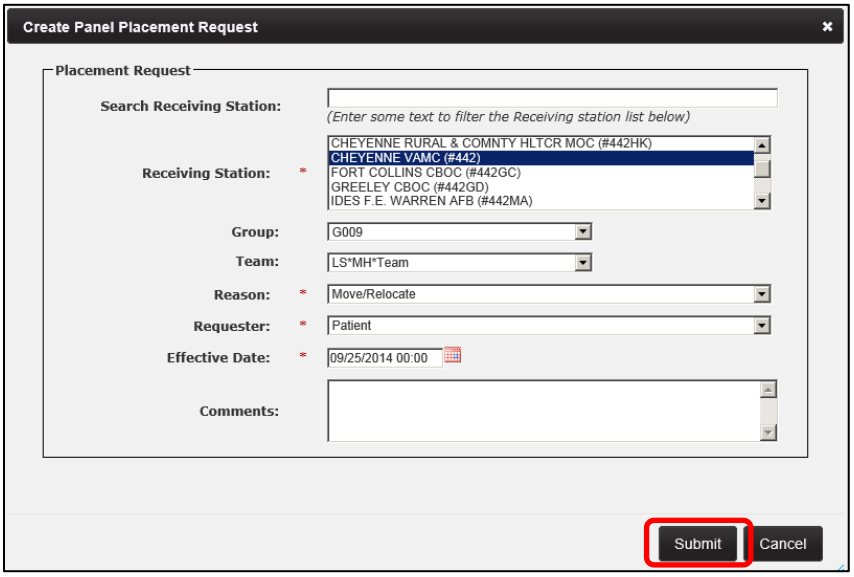
1. Expand the **View Panel Placement Requests** section from the *Patient Profile* screen.
2. The following columns will display:
    - Status
    - Status Date
    - Station Name
    - Group
    - Team
    - Requester
    - Effective Date
    - Actions

3. To make a PACT Panel Placement request, click the **Create a Request** button.

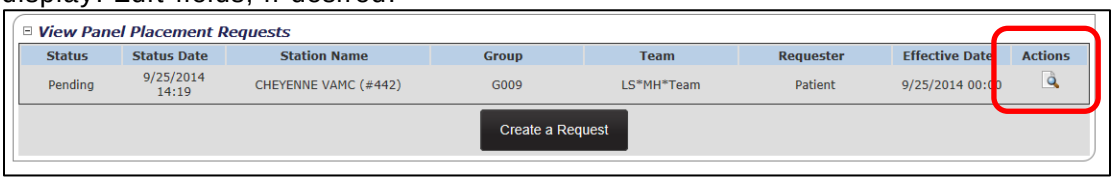


4. The **Create Panel Placement Request** popup box will display. Select the following:
    - Receiving station (required)
    - Group
    - Team
    - Reason (required)
    - Requester (required)
    - Effective Date (required) (current date/time shown, cannot be before current date/time), and
    - Comments, if desired.

5. Click **Submit**. The *Attention* popup box will display with a success message. Click **Close.**



6. The record will appear in the **View Panel Placement Requests** section with a status of *Pending*.
7. You can edit the request while still in a Pending status by clicking the corresponding icon in the **Actions** column. The *Edit Panel Placement Request* popup box will display. Edit fields, if desired.



8. Click **Submit.** The Attention popup box will display with a success message. Click **Close.**
9. A system-generated alert will be sent to each recipient when a PACT Panel Placement Request for their assigned duty station is created or updated. This alert will be sent from the system to each recipient each time a PACT Panel Placement Request is created or when the Team or Station on the request is updated.

    - *Move/Relocate* request: if the record contains a Move/Relocate reason for the request, the system will automatically un-assign the patient from the active team assignment at the first station and activate the Pending assignment at the new station when an encounter date is detected for the Pending assignment at the new station.

ALERTS

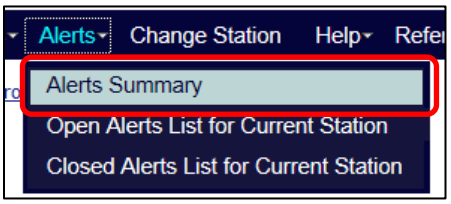
The PCMM application will generate messages to alert users when actions occur that are either informational or that require some action to be taken.

View Alerts Summary for a Station

You can view a summary of all the current alerts for the station you chose when you logged into PCMM.

There are two ways to display a summary of alerts for the station you selected when you logged in to PCMM:

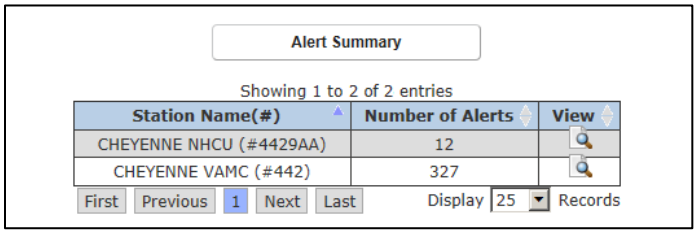
- From the PCMM Home Page, click the **Alerts** menu and select **Alerts Summary** to display the *Alerts Summary* screen.



- If you have alerts pending, you will see a notice box in the top right side of the PCMM home page. This notice provides a link to the *Alerts Summary* screen.

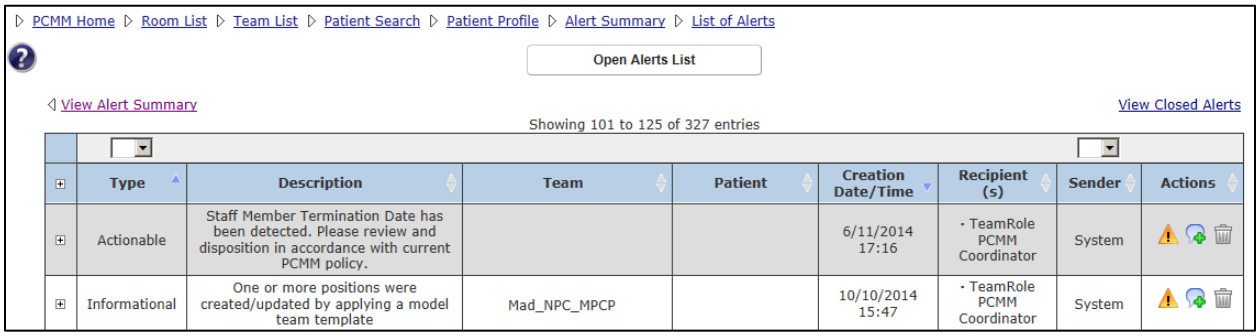
The *Alerts Summary* screen provides the following alerts information:

- The station name and number
- The number of alerts for each station listed
- You can use the **First, Previous, Next,** and **Last** buttons to navigate the list of alerts.
- Display the number of rows shown by selecting a number from the *Display Records* drop-down menu.



To view the alert details for each message, click on the magnifying glass icon in the **View** column. The *Open Alerts List* screen will display. See the *View Open Alerts for a Current Station* section for more information.

- For each alert with an Alert Type of *Informational*: One alert will be sent to each user who holds the security role defined as an **Alert Recipient**. Each user will be responsible for managing their own Informational alerts. If the specific alert does not exist for the user; it will be created. If the specific alert already exists for the user; another alert will not be created (i.e. the user will not see two of the exact same alerts).
- For each alert with an Alert Type of *Actionable*: One alert will be sent to each user who holds the security role defined as an **Alert Recipient**. The actionable alert will then be closed and removed from each user's alert list who received the alert.



Type	Description	Team	Patient	Creation Date/Time	Recipient (s)	Sender	Actions
Actionable	Staff Member Termination Date has been detected. Please review and disposition in accordance with current PCMM policy.			6/11/2014 17:16	· TeamRole PCMM Coordinator	System	
Informational	One or more positions were created/updated by applying a model team template	Mad_NPC_MPCP		10/10/2014 15:47	· TeamRole PCMM Coordinator	System	

See Also:

View Open Alerts List for a Current Station
View Closed Alerts List for a Current Station

View Open Alerts List for a Current Station

You can view all the open alerts for the station you chose when you logged into PCMM.

1. From the PCMM Home Screen, click the **Alerts** menu and select **Open Alerts List for Current Station** to display the *Open Alerts List* screen. Alternatively, you can access this page from the *Alerts Summary* screen. See the *View Alerts Summary for a Station* section for more information.

2. On the *Open Alerts List* screen you can:

   - Click the **+** symbol in the header to show all comments for all alerts in the list.
   - Click the **+** symbol next to an alert to view any comments only for that alert.
   - Sort the list by using filter drop-down menus below the **Type, Team, Patient,** and **Sender** columns. The default listing order is by *Requires Action* type and by date and time.
   - You can use the **First, Previous, Next,** and **Last** buttons to navigate the list of alerts.
   - Change the number of rows shown by selecting a new number from the **Display Records** drop-down menu.
   - Click the **View / Action on Alerts** icon in the **Actions** column to display the *Result of Batch Job Execution* screen that shows the status and details of batch actions for patients.
   - Click the **Update Comments** icon in the **Actions** column to display a dialog box that allows you to enter a comment. Click **Submit** to save a comment or **Cancel** to return to the *Open Alerts List* screen without saving the comment.
   - Click the **Delete Alert** icon (trash can) in the **Actions** column to display a dialog box that allows you to either confirm or cancel the deletion.
   - Once you have viewed an alert, the system will display a message banner at the top of the screen. The message will include the alert that needs attention, and display links that will allow you to **Save for Later**, or **Mark as Complete**.
   - Choosing **Save for Later** will keep the alert in the list, choosing **Mark as Complete** will move the alert record into the *Closed Alerts* list. See *the View Closed Alerts for a Current Station* section.
   - You can view the Closed Alerts list using the link at the top right of the screen. You can view the Alerts Summary screen using the link at the top left of the screen.

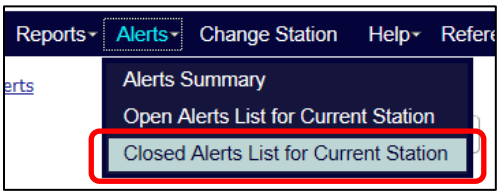
See Also:

View Alerts Summary for a Station
View Closed Alerts List for a Current Station
Result of Batch Job Execution

View Closed Alerts List for a Current Station

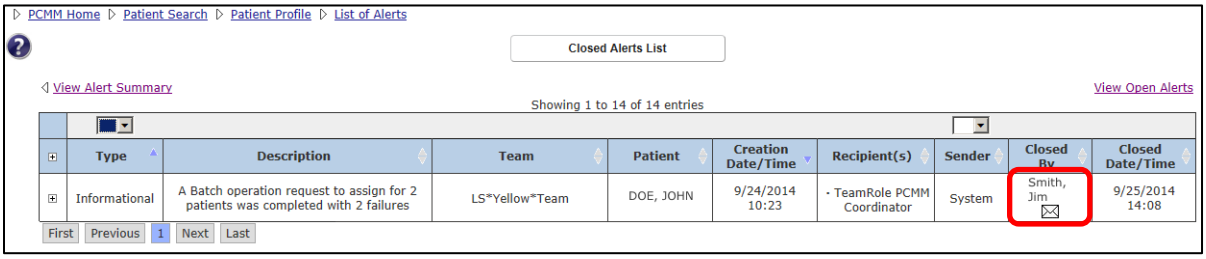
You can view all the closed alerts for the station you chose when you logged into PCMM.

1. From the PCMM Home Screen, click the **Alerts** menu and select **Closed Alerts List for Current Station** to display the *Closed Alerts List* screen.



2. On the *Closed Alerts List* screen you can:

   - Click the **+** symbol in the header to show all comments for all alerts in the list.
   - Click the **+** symbol next to an alert to view any comments only for that alert.
   - Sort the list by using filter drop-down menus below the **Type, Team, Patient,** and **Sender** columns. The default listing order is by *Requires Action* type and by date and time.
   - Change the number of rows shown by selecting a number from the **Display Records** drop-down menu.
   - Send an email to the person who closed the alert by clicking the envelope icon next to their title.



You can view the *Alerts Summary* screen, or the *View Open Alerts* screen by using the links at the top of the page.

See Also:

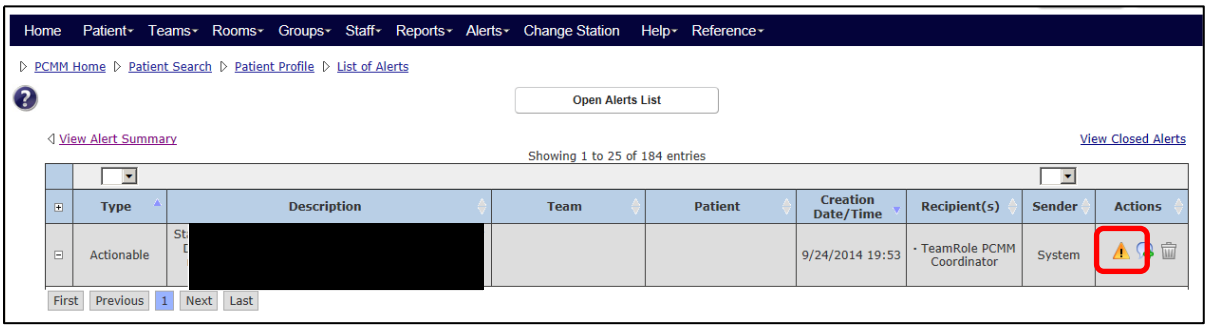
View Alerts Summary for a Station
View Open Alerts List for a Current Station

Result of Batch Job Execution

Once you submit a batch process, you will be notified that the batch job is complete. When you view the alert and wish to see the details for that alert, you can do so in the *Batch Execution Results* screen.

1. From the Alerts drop-down menu, select **Open Alerts List for Current Station** to display the Open Alerts List screen.

2. Select the **View / Action on Alerts** icon in the **Actions** column to display the *Result of Batch Job Execution* screen.



3. View the list of batch results for each patient. You can filter the list using the controls next to each heading.

See Also:

[View Alerts Summary for a Station]
[View Closed Alerts List for a Current Station]
[Background Job Log]

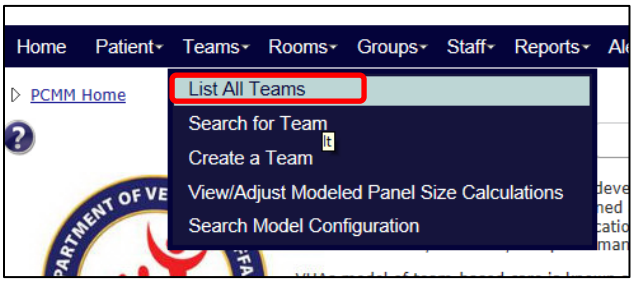
TEAM MANAGEMENT

Manage Teams

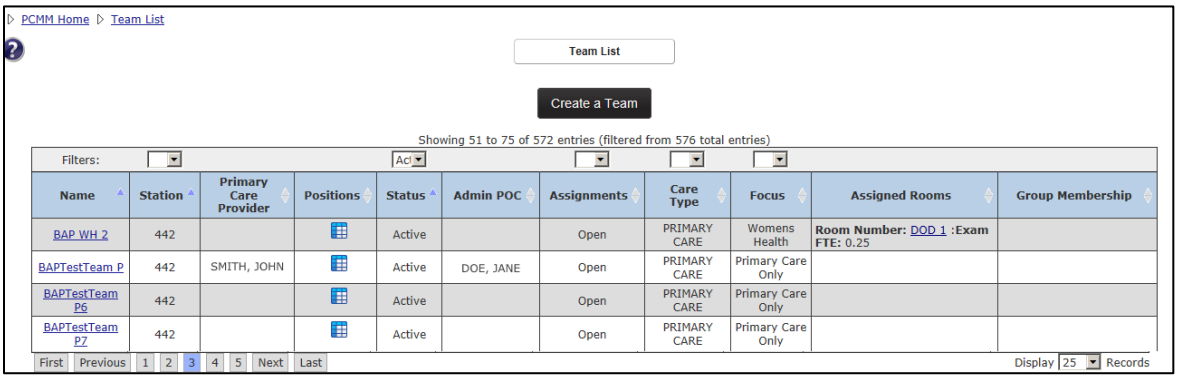
PCMM Coordinators are able to manage teams.

To manage a team:

1. Select **Teams** > **List All Teams** from the main menu to display the Team List page.



2. For each team, the list will display the:
   - Name (link to team profile page)
   - Station number
   - Primary Care Provider (email link if available)
   - Positions (link to position profile page)
   - Status
   - Admin POC and phone number (email link if available)
   - Assignments
   - Care Type
   - Focus (if there is a Focus 1 and a Focus 2 listed for the team, they will be listed in this column as Focus1 value/Focus2 value)
   - Assigned Rooms - Room number, type and FTE percentage (link to room profile page)
   - Group Membership (link to group profile page)



The team list will initially be displayed in order by Name and will include all teams. The list can be sorted by any column or narrowed by applying filter values for Station, Status, Assignments, Care Type or Focus.

You can perform the following tasks on this page, depending on your user role:

- You can create a team by clicking the **Create A Team** button.
- You can update a selected team by clicking the **Team Name**.
- You can email a **Primary Care Provider** (if there is an email address available) by clicking the email envelope icon
- You can access the **Position List** screen for the selected team by clicking the Positions icon
- You can contact an **Admin POC** by phone, or by email by clicking the email icon (if there is contact information available)
- You can update an existing room by clicking the **Room Number**
- You can update an existing group by clicking the **Group Membership** number

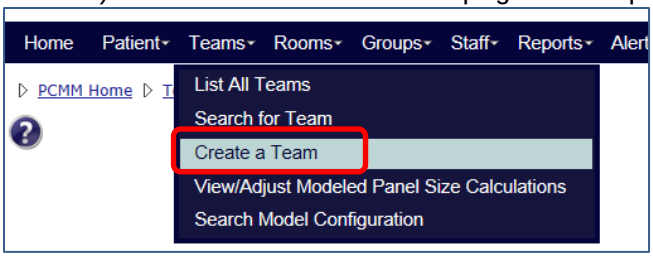
See Also:

Create a Team Profile
Search for a Team by Name
Update a Team Profile
View a Team Position
Create a Position Profile
Update a Position Profile
Search for VA Staff
Search for Non-VA Provider
Assign Staff to a Position
Remove Staff from a Position
Modify an Existing Room
Modify an Existing Group

Create a Team Profile

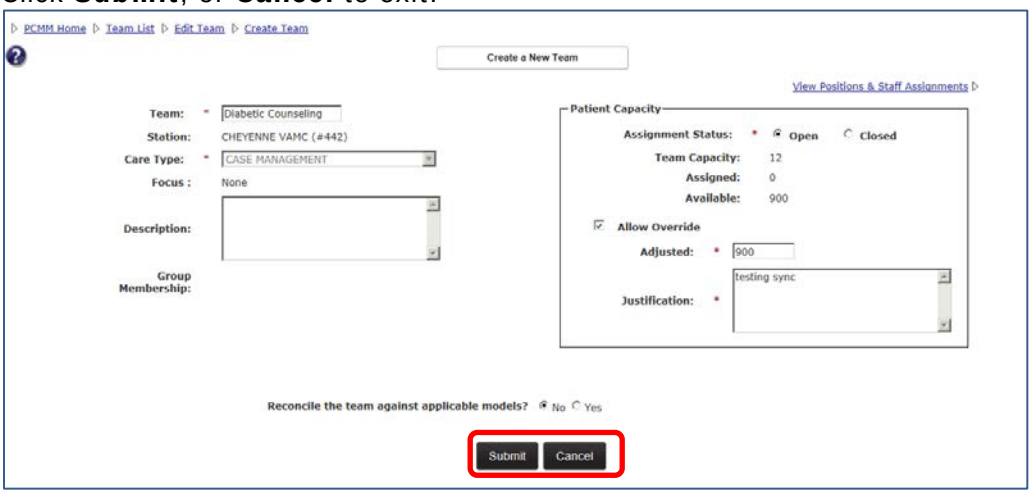
You can create a new team using the Create a Team Profile screen.

1. From the Team drop-down menu, select **Create a Team**. Alternatively, you can click the **Create a Team** button at the top of the *Teams List* page (**Teams** > **List All Teams**). The *Create a New Team* page will display.



2. Enter a name for the new team (required). Team names must be between 3 and 30 characters. If the team name already exists for the site, an error message will appear. Teams do not span multiple sites since each team will be owned by one site.
3. Select a choice from the **Care Type** drop-down list.
4. If a Care Type is listed as PRIMARY CARE, select a choice from the first **Focus** field. Select a choice from the second **Focus** field, if applicable. ***Note:*** *Focus 2 cannot be the same value as Focus 1.*

5. Enter a **Description**, if desired.
6. The following fields will be automatically populated:
   - The **Assignment** status (Open)
   - **Station Modeled Capacity** (populated according to the modeled Care Type selected)
   - **Team Modeled Capacity** (populated according to the modeled Care Type selected)
   - **Select Status** setup (Active)
   - **Effective Date for Status Change** (current date and time)
   - Select **Status Change reason** (defaulted to **New Team**). You may indicate that this team is **Closed** and not available for assignment by selecting the check box.
   - These fields can be edited. When a team is created, the activation date and reason are captured in Team History.
7. You can override the modeled capacity by selecting the **Allow Override** check box. Enter a number in the **Adjusted** field then enter a justification, if desired.
8. Click **Submit**, or **Cancel** to exit.



9. You will get a message stating that your team has been submitted successfully. If not, you will get an error message stating the reason why.

Point of Contact – Administrative section

The POC for the Administrative section will be selected from staff members when they are assigned to the team. See the Modify an Existing Position and Create a Position Profile sections for details.

Point of Contact – Clinical section

The POC for the Clinical section will be selected from staff members when they are assigned to the team. See the Modify an Existing Position and Create a Position Profile sections for details.

Non-Primary Care Teams:

- If the team created is NOT a Primary Care Team, the Aggregated Modeled Team Capacity calculations will not be used, therefore, this capacity will not be displayed in the Patient Capacity section

- If the team created is NOT a Primary Care Team, you can manually enter a panel size on the View/Adjusted Modeled Capacity screen. This number will display in the Patient
- Capacity section as the Team Capacity.

- When creating certain team profiles (Mental Health, for example), certain positions may be created according to the automatic model selection chosen. In this case, a
- Reconciliation Results link will display on the Modify an Existing Team screen. Click on this link to view the reconciliation results and the model linked to the team by clicking the links at the bottom of the page.

See Also:
Update a Team Profile
Create a Position Profile
Update a Position Profile
Reconcile Team with Models

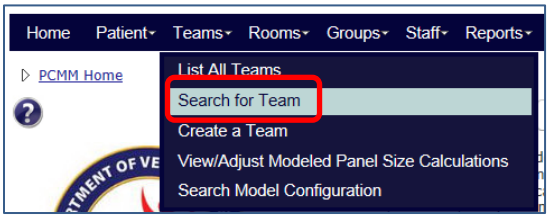
Search for a Team by Name

You can search for a team in three ways:
- by using the *Search for Team* screen,
- by using the **Patient Assignments** section of the *Patient Profile* screen or
- by using the *Team List* screen.

Any of these search methods will allow you to work with a team's profile information.

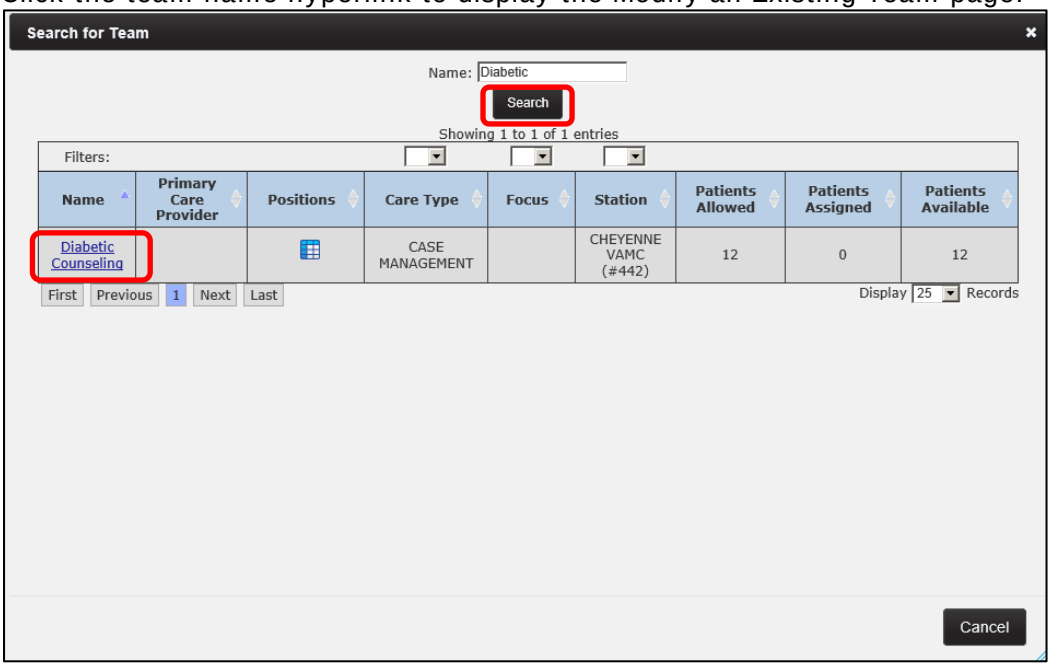
Using the Search for Team screen:

1. From the main menu, select **Teams** > **Search for Team** to display the *Search for Team* screen.



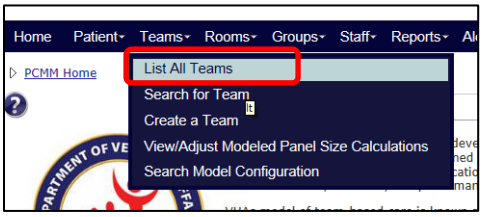
2. Enter part or all of a team's name in the **Name** field and click **Search** to display the teams that match the search criteria. Alternatively, you can click the **Search** button to view a list of all teams.

3. Click the team name hyperlink to display the Modify an Existing Team page.

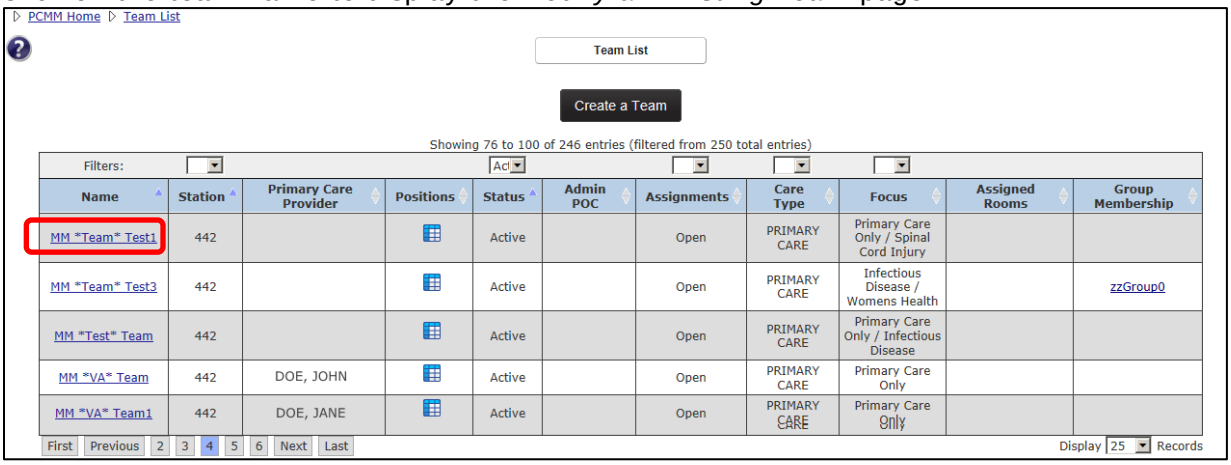


Using the Team List screen:

1. From the main menu, select **Teams** > **List All Teams** to display the *Team List* screen.

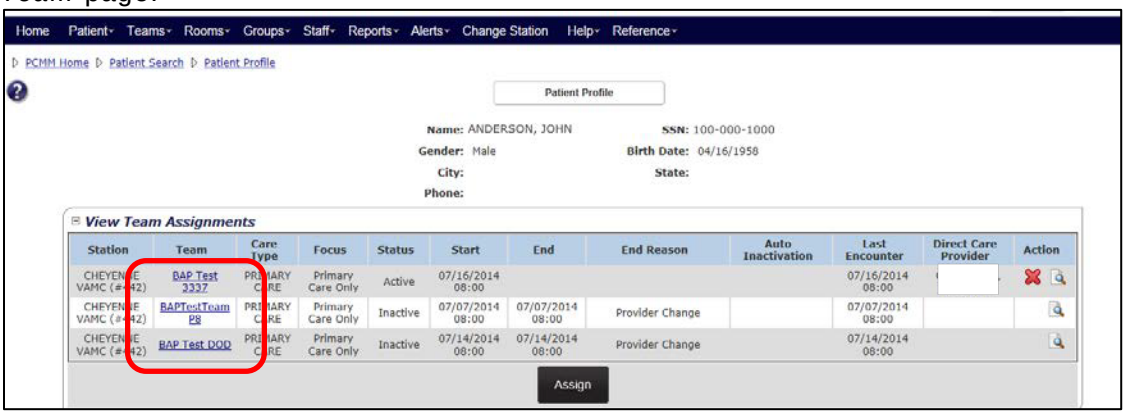


2. Scroll down, or use the navigation buttons at the bottom of the page to locate the team's name in the list.
3. Click on the team name to display the *Modify an Existing Team* page.



Using the Patient Profile screen:

1. From the *Patient Profile* page (*See the* Search for a Patient *section*), click the **View Team Assignments** toggle link to display a section that indicates what team(s) the patient is (has been) assigned to.
2. Click on the team name link in the **Teams** column to display the *Modify an Existing Team* page.



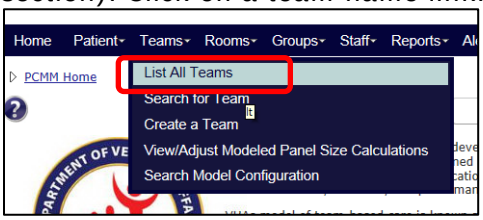
See also:

Manage Teams
Create a Team Profile
Update a Team Profile
Search for a Patient

Update a Team Profile

You can update an existing team by using the Update a Team Profile screen.

1. Select **Team** > **List All Teams** from the main menu to display the *Team List* page. Alternatively, you can search for a team (see the *Search for a Team by Name* section). Click on a team name link.



2. The *Modify an Existing Team* page will display.
3. You may enter a new name for the team. If the new team name already exists for the site, an error message will appear.
4. You may select a different **Care Type** from the drop-down list.
5. You may select a different **Focus 1** from the drop-down list.
6. You may select a **Focus 2** from the drop-down list, or change the **Focus 2** selection.
7. You may change the **Description**.
8. You may click on the **Group Membership** name to view/change the group associated with the team.

Point of Contact – Administrative section

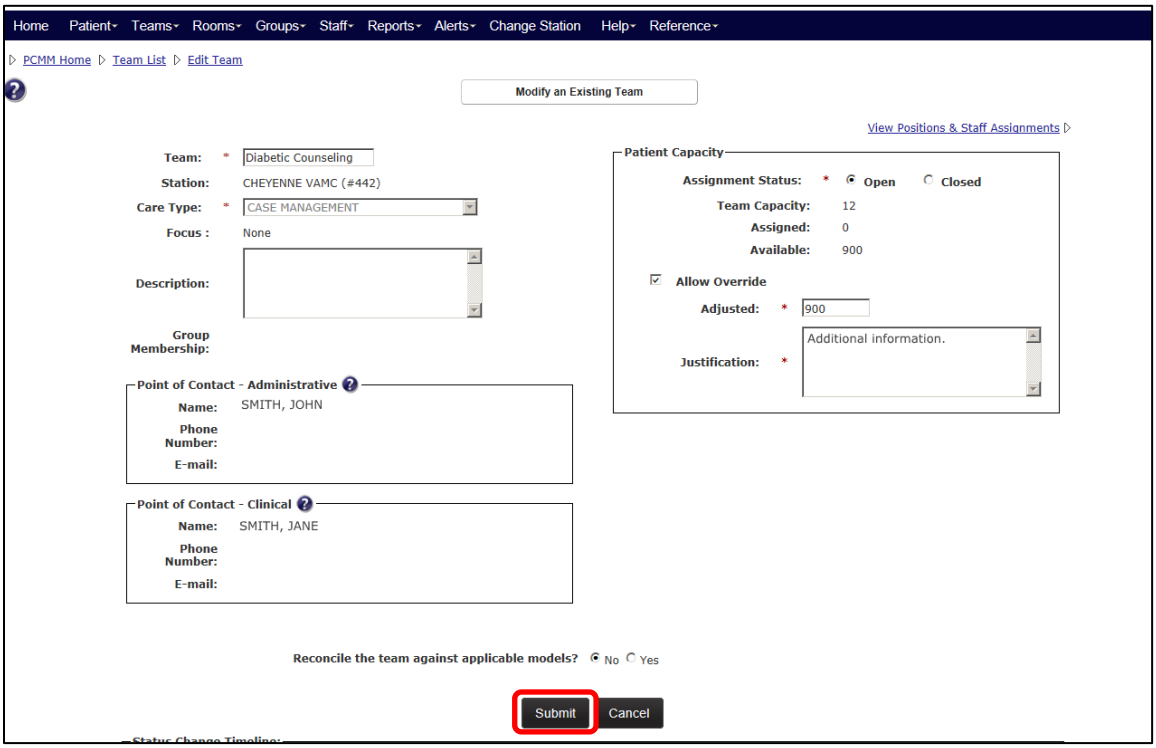
The POC for the Administrative section will be selected from staff members when they are assigned to the team. See the *Modify an Existing Position* and *Create a Position Profile* sections for details.

Point of Contact – Clinical section

The POC for the Clinical section will be selected from staff members when they are assigned to the team. See the *Modify an Existing Position* and *Create a Position Profile* sections for details.

Patient Capacity section

1. You can change the **Assignment Status** to allow or disallow future patient assignments to this team. (***Open*** *is default*).
2. You can view the *Modeled Panel Size Calculation* for this team (click the magnifying glass icon that corresponds to the **Team Modeled Capacity**).
3. The number of **Assigned** patients will be displayed.
4. The number of **Available** spots that patients can be assigned to will be displayed.
5. You can allow an override of the number of assigned patients by checking the **Allow Override** box. Enter a number in the **Adjusted** text box, enter a justification, and click **Submit**.



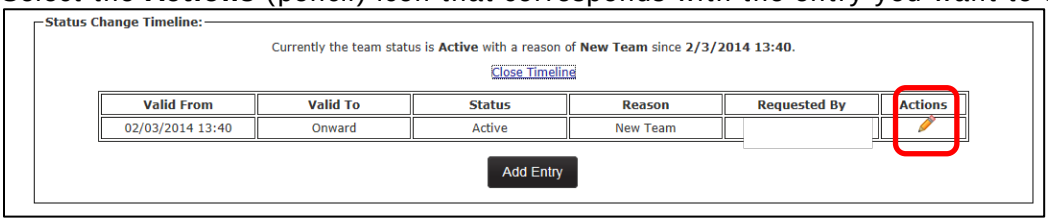
6. A confirmation message will display.

Status section

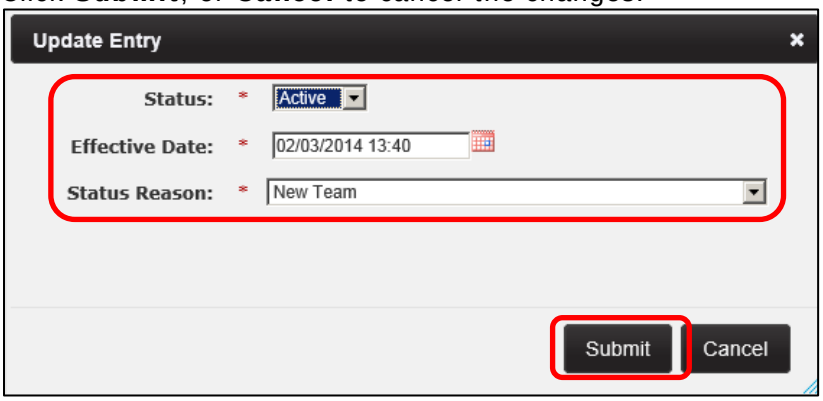
You may change the team's status by clicking the **View / Edit Complete Timeline** link in the *Status Change Timeline* box near the bottom of the screen:

To edit an entry:

1. Select the **Actions** (pencil) icon that corresponds with the entry you want to edit.



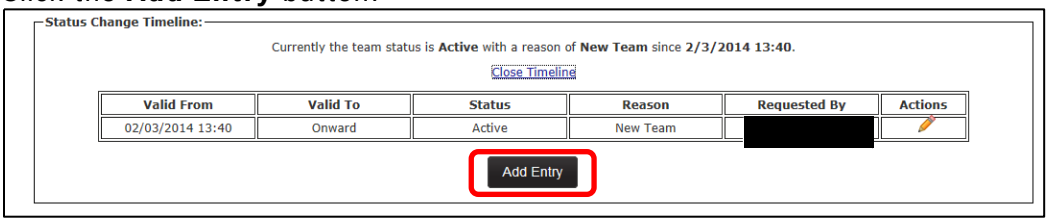
2. You may change the **Status, Effective Date**, and/or the **Status Reason**.
3. Click **Submit**, or **Cancel** to cancel the changes.



4. A confirmation message will display. Click **Close**.

To add a new entry:

1. Click the **Add Entry** button.



2. You may change the **Status, Effective Date**, and/or the **Status Reason**.

3. Click **Submit**, or **Cancel** to cancel the changes.

4. A confirmation message will display.
   - In order for the Status to be updated from Active to Inactive, all Active positions for the team must be unassigned.
   - If the Status is updated from Active to Inactive; the Inactive Date must be greater or equal to the Active Date.
   - The Status Date and Status Reason are required and must be entered anytime the Status is changed.
   - The status history will also be shown in this list.

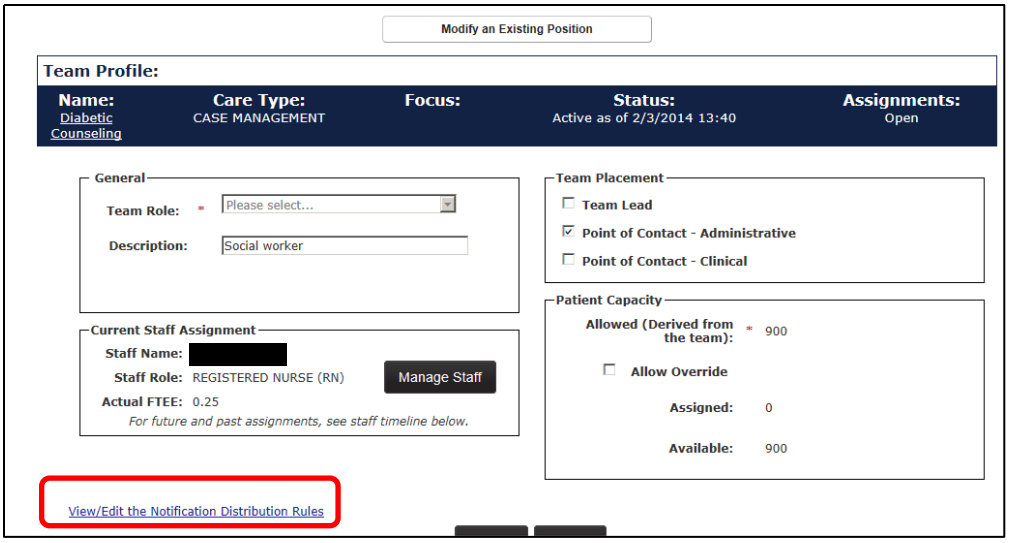
See Also:

Create a Team Profile
Search for a Team by Name
Validate Team Data Consistency
Reconcile Team with Models
View Team Attributes Change History
View a Team Position

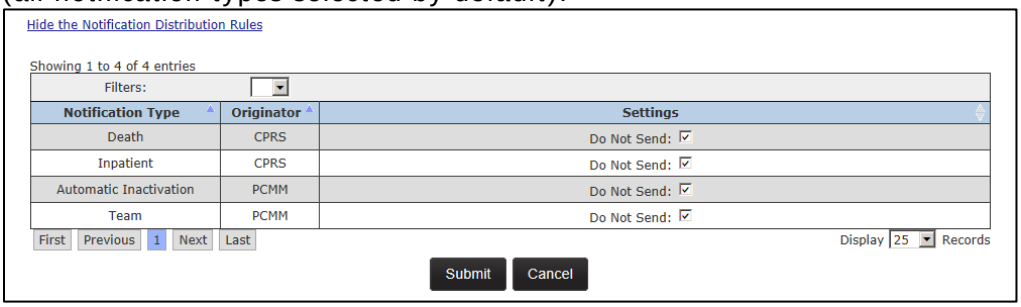
Manage Team and Position Notifications

You can determine which team members receive notifications concerning patients assigned to them on both the Team Profile and Team Position Profile screens.

1. From the *Modify an Existing Position* screen (*see the Update a Position Profile section*), click the **View/Edit the Notification Distribution Rules** link to display the Distribution Rules table for that position.



2. Alternatively, this link will also display on the Create a Position page (*see the Create a Position Profile section*) for the new position created.
3. You can filter the list by *Originator* settings (PCMM or CPRS), if needed.
4. Select the check boxes next to the notifications you **do not** wish to send to the team (all notification types selected by default).



5. Click **Submit** to save any changes. A message will appear at the top of the screen that team changes were saved successfully.
    - If you deselected a notification, select either:
        - **All Team Patients** (to send notifications regarding all team patients), or
        - **Only Patients assigned to this Position** (to send notifications regarding just patients assigned to the position).

Note: You may use the filters above and below the table to restrict or expand the number of rules shown.

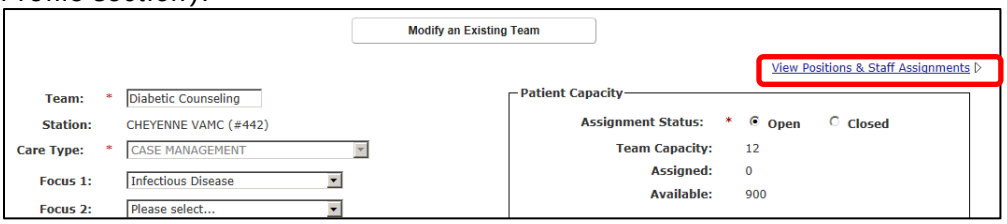
See also:

Update a Team Profile
Update a Position Profile
Create a Position Profile

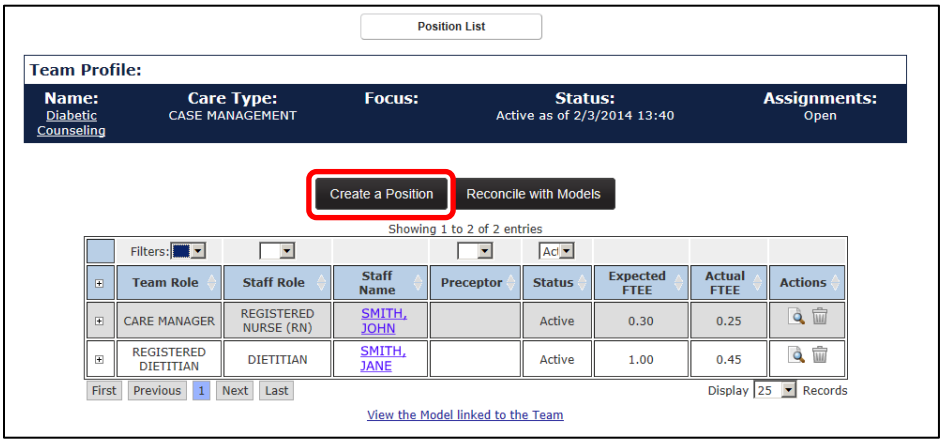
Create a Position Profile

You can create a position for a team.

1. Locate the team you want to work with (*See the Search for a Team by Name section*).
2. From the *Modify an Existing Team* screen, click the **View Positions & Staff Assignments** link. The Position List screen will display (*see the* View a Position Profile *section*).



3. Click the **Create a Position** button to display the *Create a Position* screen.
   - The team must have a status of *Active* as of now - OR - a status of *inactive*, but it will be reactivated in the future.



General Section

1. Select a **Team Role** from the drop down list. A Team Role may be established more than once within the team. The *Description* may be used to differentiate between two identical roles.
   - If the Team Role is *Primary Team Provider*, this is the team position performing Primary Care. There may only be one active Primary Care team position per team. See the Preceptor/Preceptee Relationships section for more information.
2. Enter a **Description** in the text box, if desired. The maximum length is 250 characters.
3. Enter the **Expected FTEE**. It must be greater than 0.00 and it cannot be greater than 1.00.

Status Setup Section

1. Change the **Status** if desired using the drop down list (*Active* is shown by default).
2. Select the **Effective Date for Status Change** using the calendar control (present date and time is shown by default). If you change the date, keep in mind that it cannot be prior to the team's creation date.

3. Change the **Select Status Change Reason** if desired using the drop down list (*New Team Position* is selected by default).

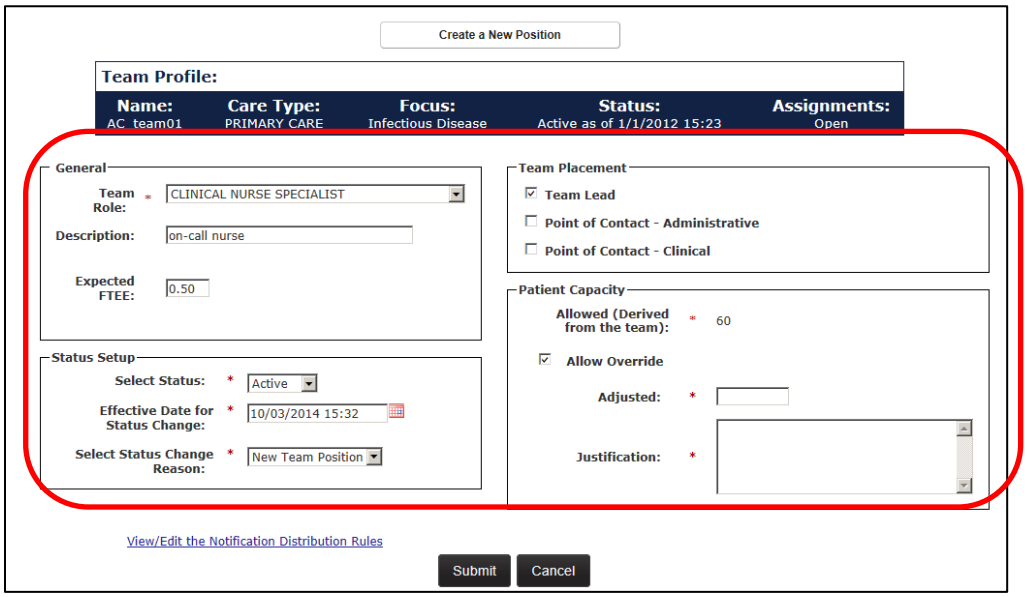
Team Placement Section

1. **Team Lead** - There may only be one Active *Primary Care* position per team. You may choose to make this position the team lead. There may only be one active Team Lead per team.
2. **Point of Contact - Administrative** - You may choose to make this position the primary point of contact for the team. There may only be one active primary point of contact per team.
3. **Point of Contact - Clinical** - You may choose to make this position the secondary point of contact for the team. There may be multiple secondary points of contacts.
4. You should set up positions that can act as preceptors first so they exist for the preceptees.

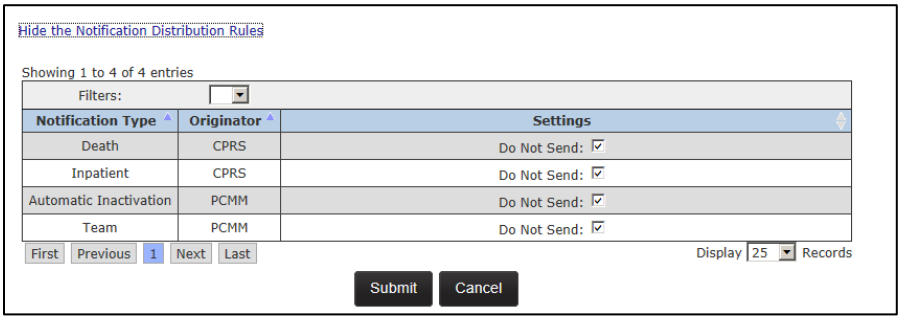
Patient Capacity Section

The system will automatically display the allowed patient capacity for the calculate team model.

1. You can override the allowed patient capacity number by checking the **Allow Override** check box.
2. Enter the number of Patients that will be allowed to be assigned to the team in the **Adjusted** text box.
3. If desired, enter a justification for the override in the **Justification** text box.
4. The system will track and display the number of Patients that are currently assigned to this position in the **Assigned** field.
5. The system will track and display the number of Patients assignments that are currently available for this position in the **Available** field.
6. Click the **Submit** button to save the information to the database.



- Click the **View/Edit the Notification Distribution Rules** link to view a list of notification types and settings for the team. *See the* ***Manage Team and Position Notifications*** *section for more information*.



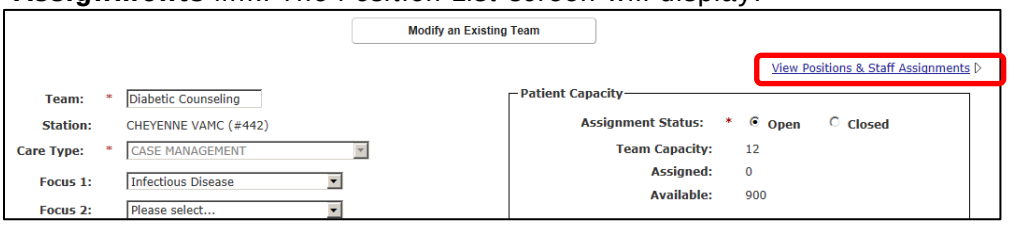
See Also:

View a Patient Profile
Search for a Team by Name
View a Team Position
Manage Team and Position Notifications
Update a Position Profile
View or Edit Position History
View Position Attribute Change History
Preceptor/Preceptee Relationships
Assign a Surrogate
View/Edit Surrogate Staff Assignments
View Team Attributes Change History

View a Team Position

You can view current information for a position on a team, and update the information.

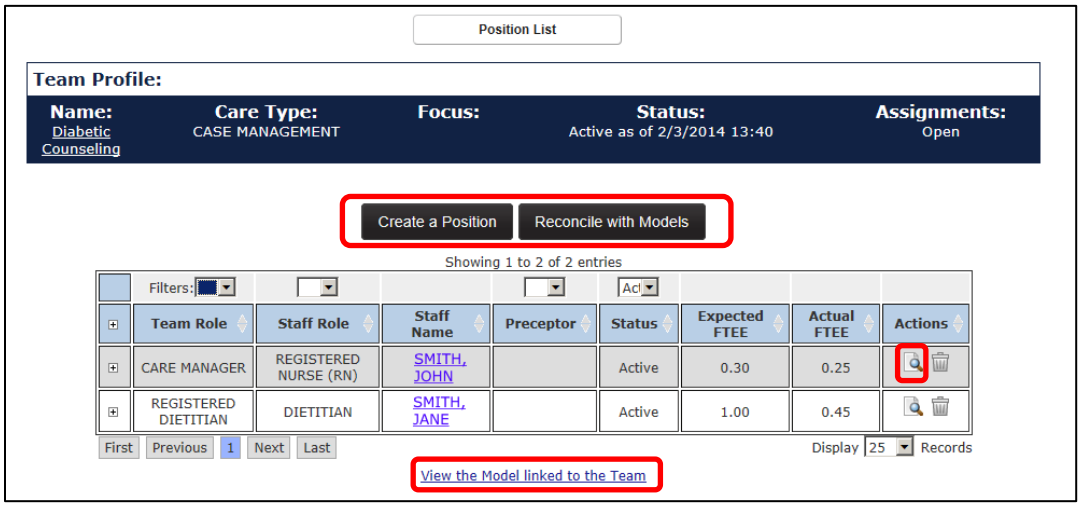
1. Locate the team you want to work with (*See the* Search for a Team by Name *section*).
2. From the *Modify an Existing Team* screen, click the **View Positions & Staff Assignments** link. *The Position List* screen will display.



3. For each position, the list will display the:
   - Team Role
   - Staff Role
   - Staff Name
   - Preceptor
   - Preceptee(s)
   - Status
   - Expected FTEE*
   - Actual FTEE*
   - Actions

4. Click the icon in the **Action** column that corresponds to the desired position to update. The *Modify an Existing Position* screen will display.
5. View the Position details and click **Cancel** to exit from the screen.
6. Click the **Create a Position** button to create a new position (*See the* Create a Position Profile *section*). Click the **Reconcile with Models** button to reconcile the team positions with the available team models. See the *Reconcile Team with Models* section.
7. You can assign staff to the team by clicking on the **Staff Name** link. See the *Assign Staff to a Position* section.
8. You can view the team model by clicking the **View the Model linked to the Team** link. The team care type, focus, station, all model team roles and if the roles are required are displayed. Click **Close the Model** to hide this information.

*FTEE: Full Time Equivalent (indicates the workload of a position: an FTEE of 1.0 indicates that the position is a full-time position, an FTEE of 0.5 indicates the position will be available half-time, etc.)



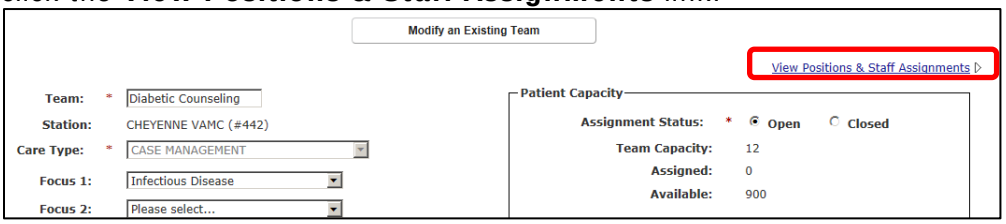
See Also:

Search for a Team by Name
Create a Position Profile
Update a Position Profile
Reconcile Team with Models
Assign Staff to a Position

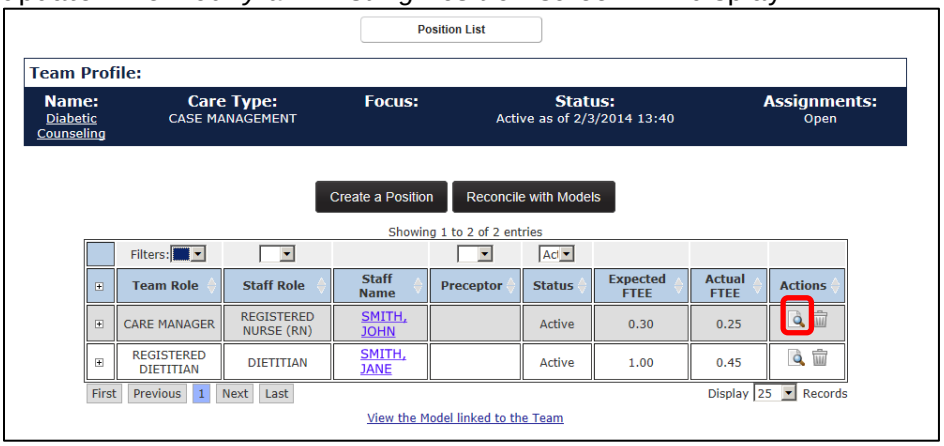
Update a Position Profile

You can update/modify a position's attributes through the *Modify an Existing Position* screen.

1. Locate the team you want to work with (*See the* Search for a Team by Name *section*).
2. From the *Modify an Existing Team* page (*see the* Update a Team Profile *section*), click the **View Positions & Staff Assignments** link.



3. The **Position List** screen will display (*see the* View a Team Position *section*).
4. Click the icon in the **Action** column that corresponds to the desired position to update. The *Modify an Existing Position* screen will display.



General Section

1. The **Team Role** associated with the Position cannot be updated. A *Team Role* may be established more than once within the team. The *Description* may be used to differentiate between two identical roles. However, if there are two positions on the team with the same role at the same time (active at a certain date), you will get a message with the information that the team is inconsistent.
   - If the Team Role is *Primary Team Provider*, this is the team position performing *Primary Care*. There may only be one active *Primary Care* team position per team.
   - See the *Preceptor/Preceptee Relationships* section for more information.
2. Enter a **Description** in the text box, if desired. The maximum length is 250 characters.
3. You may change the **Expected FTEE**. It must be greater than 0.00 and it cannot be greater than 1.00.

Current Staff Assignment

If there are staff assigned to the team, the following information is displayed:

- Staff Name
- Staff Role
- Actual FTEE

1. Click the **Assign Staff** button to choose and assign a staff member to a position. *See the* Assign Staff to a Position *section for more information.*

For future and past assignments, see staff time line.

Team Placement Section

2. **Team Lead** - There may only be one Active *Primary Care* position per team. You may choose to make this position the team lead. There may only be one active Team Lead per team.
3. **Point of Contact** - **Administrative** - You may choose to make this position the primary point of contact for the team. There may only be one active primary point of contact per team.
4. **Point of Contact - Clinical** - You may choose to make this position the secondary point of contact for the team. There may be multiple secondary points of contacts.
5. You should set up positions that can act as preceptors first so they exist for the preceptees.

Patient Capacity Section

The system will automatically display the allowed patient capacity for the calculated team model.

1. You can override this number by checking the **Allow Override** check box.
2. Enter the number of Patients that will be allowed to be assigned to the team in the **Adjusted** text box.
3. If desired, enter a justification for the override in the **Justification** text box.
4. The system will track and display the number of Patients that are currently assigned to this position in the **Assigned** field.
5. The system will track and display the number of Patients assignments that are currently available for this position in the **Available** field.

Click the **Submit** button to save the information to the database.

- In order for the **Status** to be updated from *Active* to *Inactive*, all Active Patient Assignments for the Position must be unassigned.
- If the position is a *Preceptor*, in order for the Status to be updated from *Active* to *Inactive,* all Active Preceptee Assignments for the Position must be unassigned.
- If the **Status** is updated from *Active* to *Inactive*; the Inactive Date must be greater or equal to the Active Date.
- The **Status Date** and **Status Reason** are required and must be entered anytime the Status is changed.

Click the **View/Edit the Notification Distribution Rules** link to view a list of notification types and settings for the team. *See the* Manage Team and Position Notifications *section for more information.*

Click the **View Position Attribute Change History** to view the History of position attribute changes screen. *See the* View Position Attribute Change History *section for more information.*

Open the **View Surrogate Staff Assignments** section to view a list of surrogate staff assignments. You can edit or delete a surrogate staff member using this list. You can also assign a surrogate staff member by clicking the **Assign Surrogate Staff** button. *See the* Assign a Surrogate *and* View/Edit Surrogate Staff Assignments *sections for more information.*

Open the **View Patient Assignments** section to view a list of patients assigned to the team. You can view a Current or Historical Assignments list. You can filter the patient list by using the text box provided. You can also perform a Batch Operation on selected patients. Click a patient name to view the Patient Profile screen. See the View a Patient Profile section for more information. ***Note:*** *Since the patients are assigned to the entire team UNLESS the team has Associate Provider roles(s) established (the user can choose whether they want to assign the PCP or AP to the patient), the patient assignments will vary depending on how the team is set up and staffed. See the* Assign Patient to a Team *section for more details.*

- You can delete a position that is not a part of the basic team model configuration, if no patients have been assigned to the team. From the **Position List** screen, click the Trash Can icon in the **Actions** column that corresponds to the position you want to delete. If no trash can icon appears, either the position is a required position for the team model, and the team has been reconciled against that model, or there have been patients assigned to the team. The position can be inactivated, though. See above for details.

Open the **Staff Assignment Timeline** section to view a list of staff records moved from the Current Assignment. The Staff Assignment Timeline includes the Staff Name, Staff Role, Actual FTEE, End Date, Reason , Unassignment Reason (if applicable) of all staff members assigned to/unassigned from the position. You can add, update and delete an entry in the Staff Assignment Timeline by clicking the icons or update an assignment by clicking the **New Assignment** button. The **NEW FTEE Entry** button, you can update the FTEE and Effective Date.

Open the **Preceptor Assignment Timeline** section to view a list of preceptor assignments. The Preceptor Assignment Timeline includes the Start Date, End Date, Preceptor and Preceptee information. You can edit or add a new preceptor from this list. *See the* Preceptor/Preceptee Relationships or Assigning a Preceptor/Preceptee *for more information*.

Modify an Existing Position

Team Profile:

Name:	Care Type:	Focus:	Status:	Assignments:
AC_team01	PRIMARY CARE	Infectious Disease	Active as of 1/1/2012 15:23	Open

General

Team Role: * ADMINISTRATIVE ASSOCIATE

Description:

Expected FTEE: * 1.00

Team Placement

☐ Team Lead

☐ Point of Contact - Administrative

☐ Point of Contact - Clinical

Patient Capacity

Allowed (Derived from the team): * 60

☐ Allow Override

Assigned: 45

Available: 15

Current Staff Assignment

Staff Name: (none)

Staff Role: (none)

Actual FTEE: (none)

Assign Staff

For future and past assignments, see staff timeline below.

View/Edit the Notification Distribution Rules

Submit Cancel

View Position Attribute Change History

Status Change Timeline:

Currently the position status is **Active** since **1/23/2014 15:23**.

View/Edit Complete Timeline

⊞ ***View Patient Assignments***

⊞ ***Staff Assignment Timeline***

⊞ ***Preceptor Assignment Timeline***

See Also:

Search for a Team by Name
View a Team Position
Update a Team Profile
Create a Position Profile
Preceptor/Preceptee Relationships
Manage Team and Position Notifications
View or Edit Position History
Assign Staff to a Position
Assign Patient to a Team
View a Patient Profile
Assign a Surrogate
View/Edit Surrogate Staff Assignments
View Position Attribute Change History

Preceptor / Preceptee Relationships

If the Staff Role = **Physician Assistant Trainee** and staffed	*then*	The Preceptor Position Name and Staff Name will be defaulted from the position on the team with a role = "Physician Assistant"	**>**	If there is more than one eligible Preceptor position, all eligible Preceptor positions will be presented to allow the user to select one
If the selected Role is Resident (Physician) (AP), Nurse Practitioner Trainee (NP) or Physician Assistant Trainee (PA)	*then*	You must indicate this position needs to be associated with a staffed preceptor position on the team in order to save the position.	**>**	A message to indicate that there is not a corresponding staffed preceptor position currently available will be displayed if there are no current preceptor positions assigned.
If the Role is **Nurse Practitioner** and is staffed	*then*	It may precept **Nurse Practitioner Student.**		
If the Role is Physician Assistant and is staffed	*then*	It may precept **Physicians Assistant Student**		
If the Role is **Physician – <<Name>>** and is staffed	*then*	It may precept any other position		
If the Role is Resident (Physician) (AP), the Preceptor Position Name and Staff Name will be defaulted from the position on the team with a role of Physician-<<Name>>.	**>**	If there is more than one eligible **Preceptor** position, all eligible *Preceptor Position Names* will be presented to allow you to select one. This will only occur if the role is staffed.	**>**	If the preceptor role is not staffed, you cannot save the position with the **Physician-Attending** role until it is staffed. The Position Note **Physician Attending** will be displayed when the preceptor is staffed and assigned to precept this position.
If the Role is **Nurse Practitioner Student**, the Preceptor Position Name and Staff Name will be defaulted from the position on the team	**>**	If there is more than one eligible **Preceptor** position, all eligible *Preceptor Position Names* will be presented to allow you to select one. This will only occur if the role		

with a role of **Nurse Practitioner.**		is staffed.		
If the Role is **Physician Assistant Student**, the *Preceptor Position Name* and *Staff Name* will be defaulted from the position on the team with a role of **Physician Assistant**.	**>**	If there is more than one eligible **Preceptor** position, all eligible *Preceptor Position Names* will be presented to allow you to select one. This will only occur if the role is staffed.		
If the Role is Physician – Primary Care, Resident (Physician) (AP), Physician Assistant (PCP), or Nurse Practitioner (PCP), this is the position performing Primary Care.	*then*	This will require the Full Time Employee Equivalent (FTEE) value to be entered and it cannot be greater than 1.0.		

- Whenever a preceptor relationship is assigned or unassigned, history regarding the preceptor, the preceptee and their respective staff assignments and dates will be captured in the History.
- If the position has an Active Preceptor or Preceptee assignment, the position cannot be inactivated until all preceptor/preceptee assignments are removed.
- If the position is a Preceptor, in order for the Status to be updated from Active to Inactive – all Active Preceptee Assignments for the Position must be unassigned.
- If the position is a Preceptee, in order for the Status to be updated from Active to Inactive – all Active Preceptor Assignments for this position must be unassigned.

See also:

Assigning a Preceptor/Preceptee

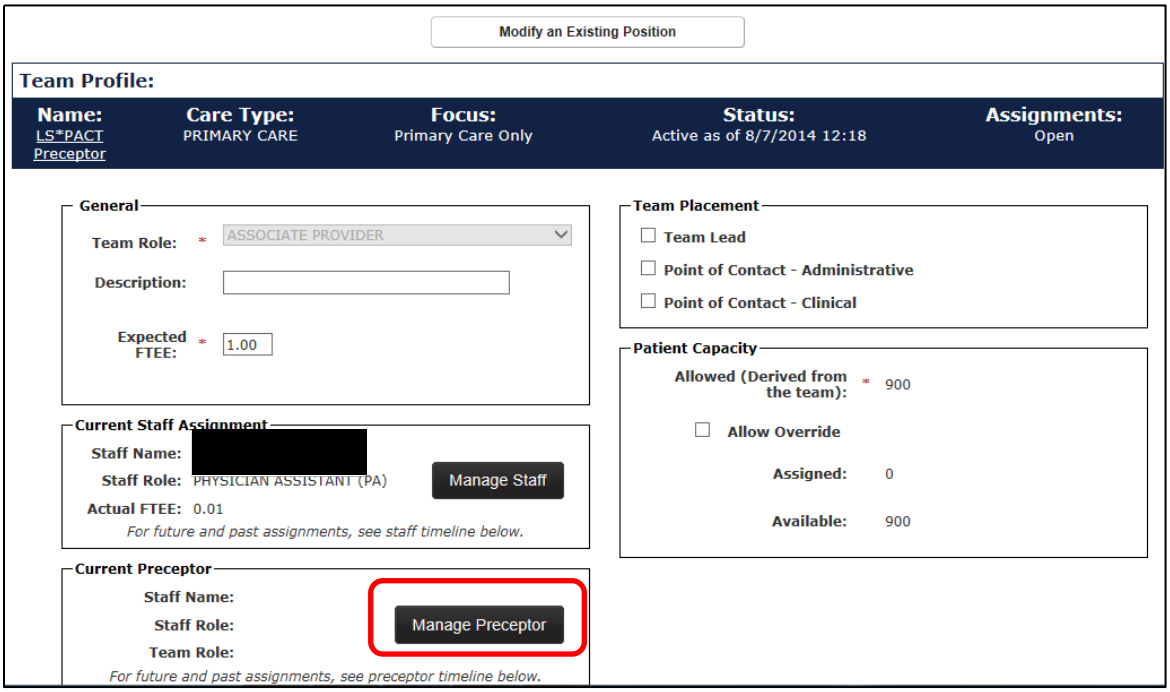
Assigning a Preceptor/Preceptee

The user should setup and staff positions that can act as preceptors first so they exist for the preceptees. The ability to establish a preceptor relationship cannot occur until both preceptee and preceptor positions are established and are staffed.

You can assign a Preceptor to a position:

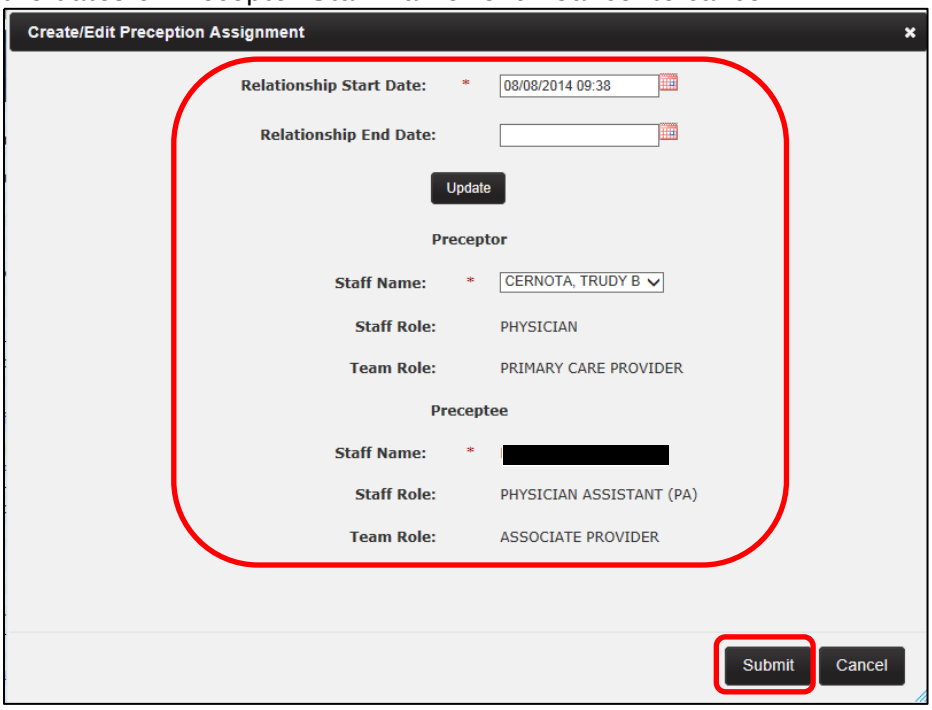
1. From the *Modify an Existing Position* screen (*see the* Update a Position Profile *section*), locate the *Current Preceptor* section. Current Preceptor information is read-only on this screen. Click the **Manage Preceptor** button.

- ***Note:*** *Alternatively, if there is an existing Preceptor assignment, you can click the* ***Add Preceptor Assignment*** *button in the Preceptor Assignment Timeline section.* You can only add a staff member only if more than one staff member is authorized to be a preceptor. See the Preceptor/Preceptee Relationships section for details.



2. The *Create/Edit Preception Assignment* dialog box is displayed with the current information:
   - **Relationship Start Date** (required): the current date/time is shown. You may edit this date, but it cannot be a past date
   - **Relationship End Date:** This is not required, but cannot be a past date
   - **Update** button: Click **Update** to update the dates (and set the Relationship End Date, if applicable)
   - Preceptor information:
     - **Staff Name:** Current staff member is displayed, but you may choose from the dropdown to change (if more than one staff member is authorized to be a preceptor. *See the* Preceptor/Preceptee Relationships *section*)
     - **Staff Role:** Read-only
     - **Team Role:** Read-only
   - Preceptee information:
     - **Staff Name:** Read-only
     - **Staff Role:** Read-only
     - **Team Role:** Read-only

3. Click **Update** to update the *Relationship Start/End date*, or click **Submit** to change the dates or Preceptor Staff Name. Click Cancel to cancel.



4. A success message will display and the assignment/update data will be displayed in the Current Preceptor section. Click **Close** to close the dialog box.

Preceptor Assignment Timeline:

You can edit an entry or add a new entry using this section.

To **Edit** an entry:

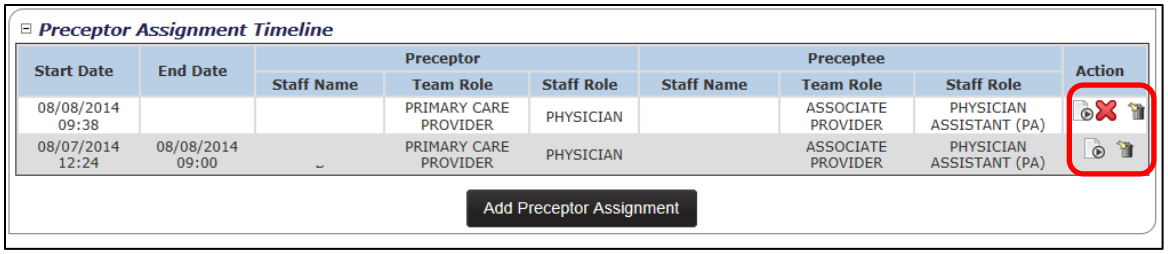
1. Click the **Edit** icon in the **Actions** column.
2. The *Create/Edit Preception Assignment* dialog box is displayed with the current information.
3. You can edit as described above.

To **Inactivate** an entry:

1. Click the **Inactivate** icon (red X) in the **Actions** column.
2. The *Are You Sure?* dialog box displays. Click **Confirm** to confirm, **Cancel** to cancel.
3. The Preceptor will be inactivated.

To **Delete** the entry:

1. Click the **Delete** icon in the *Actions* column.
2. Login to VistA if prompted (if you are already logged in, you won't be asked). Confirm the deletion.
3. The record will be deleted.



See also:

Update a Position Profile
Preceptor/Preceptee Relationships
Assigning a Preceptor/Preceptee

Assign a Surrogate

You can assign someone to receive your PCMM notifications from the notification distribution list while you are away during stated times. A surrogate receives notifications for a specified position of a team during a specified date range and can act upon the notifications.

1. From the *Modify an Existing Position* page, scroll down to the **View Surrogate Staff Assignments** section. (*See the* Update a Position Profile *section for more information, including how to navigate to this page.*)
2. Click the plus (+) sign next to the table title to display the contents of the table.
3. Click the **Assign Surrogate** button to display the *Create Surrogate Staff Assignment* window.
4. Enter at least three letters of a last name and click **Search**.
5. Choose a staff name and click the **Select** (blue check) icon.
6. Click **Submit** or **Cancel** to cancel.

- You will get a success message, and can view the new staff assignment in the View Surrogate Staff Assignments table.

See also:
Create a Position Profile
Update a Position Profile
View/Edit Surrogate Staff Assignments

View / Edit Surrogate Staff Assignments

A surrogate receives notifications for a specified position of a team during a specified date range and can act upon the notifications.

1. From the *Modify an Existing Position* page, scroll down to the *View Surrogate Staff Assignments* section. (*See the* Update a Position Profile *section for details on how to navigate to the Modify an Existing Position page*).
2. Click the plus (+) sign next to the table title to display the contents of the table.
3. Choose a staff member and click the edit (pencil) icon to view the *Edit Surrogate Staff Assignment* screen.

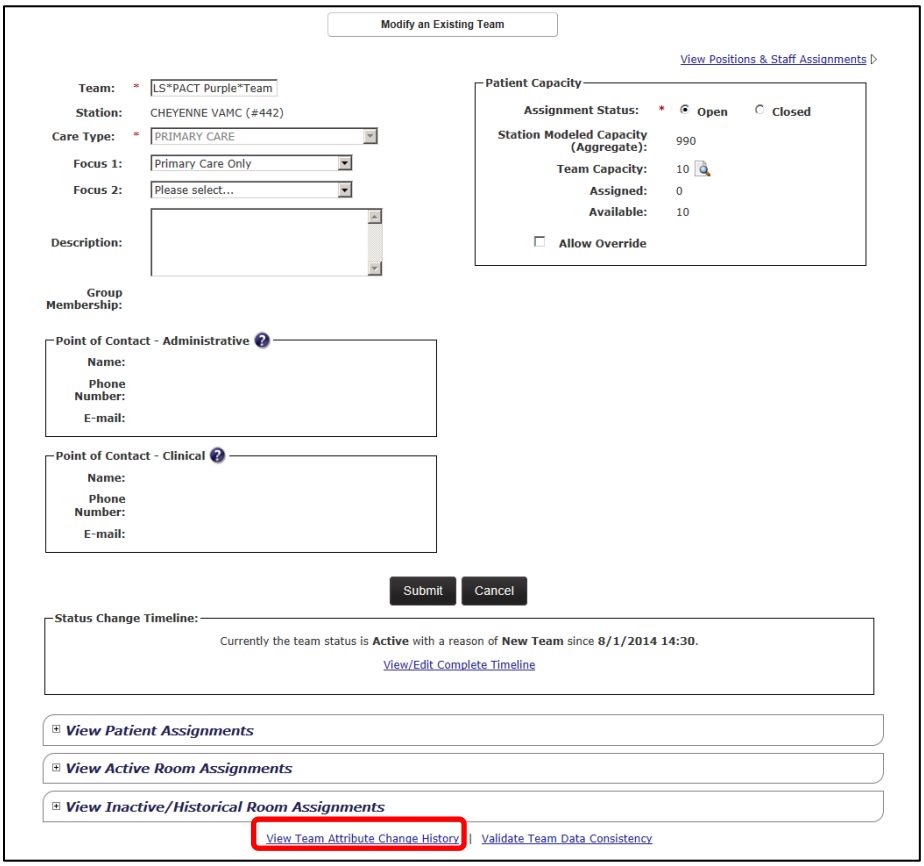
4. Enter a different **Start Date/Time** and/or a different **End Date/Time** using the calendar controls.
5. Click **Submit**, or **Cancel** to cancel out of the edit.
    - You will get a success message, and can view the new changes in the *View Surrogate Staff Assignments* table.
    - You can also choose to delete the staff member from the list. Click the **Delete** (trash can) icon. You will also get a success message, and can view the new changes in the *View Surrogate Staff Assignments* table.

See also:
Create a Position Profile
Update a Position Profile
Assign a Surrogate

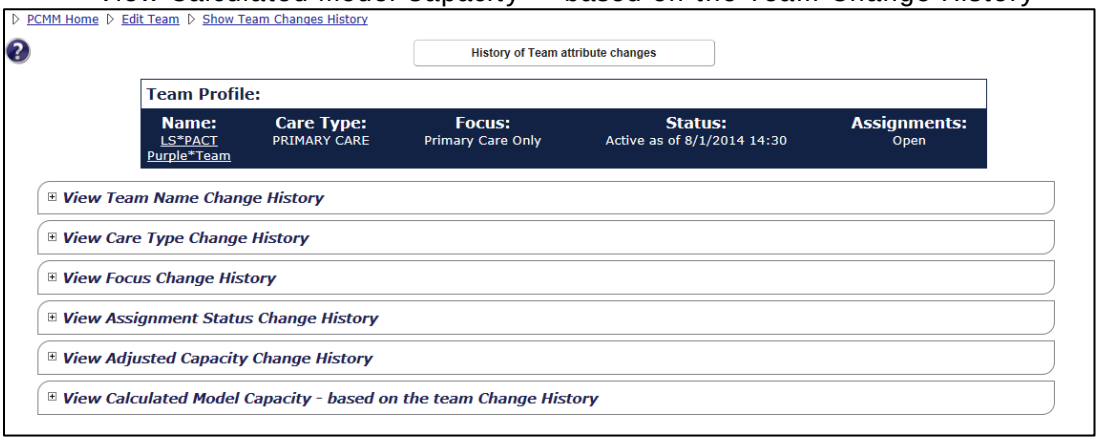
View Team Attributes Change History

You can view several team change history statistics using the View Team Attributes Change History link.

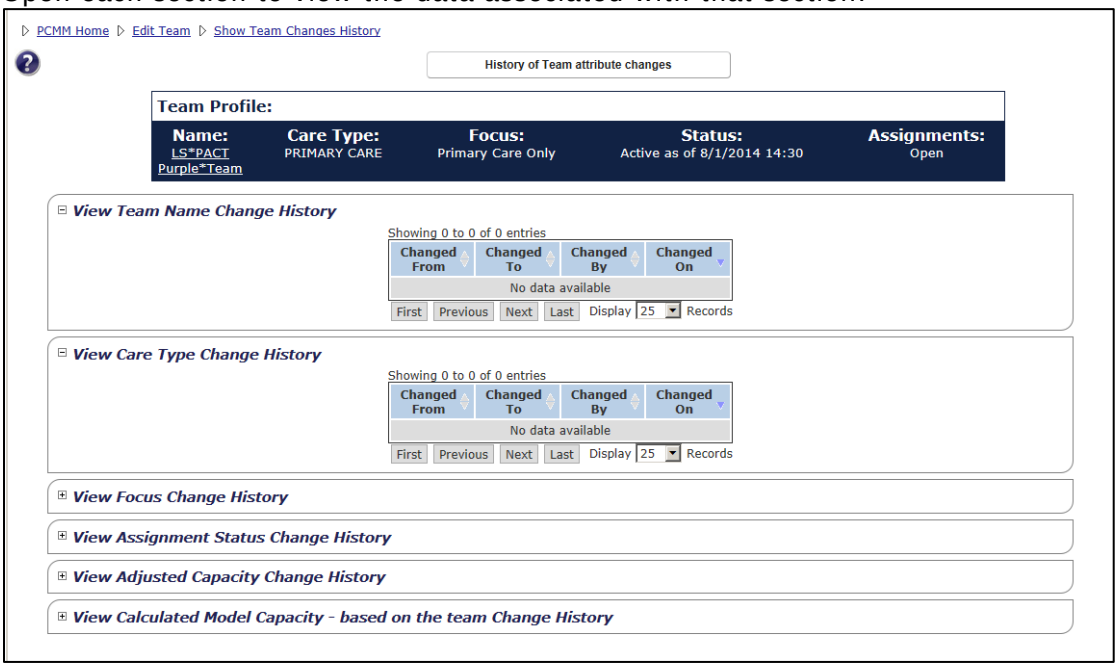
1. From the *Modify an Existing Team* screen (*see the* Update a Team Profile *section for information*), click the **View Team Attribute Change** History link near the bottom of the screen.



2. The *History of Team Attribute Changes* screen displays with the following sections:
    - View Team Name Change History
    - View Care Type Change History
    - View Focus Change History
    - View Assignment Status Change History
    - View Adjusted Capacity Change History
    - View Calculated Model Capacity -- based on the Team Change History



3. Each of these sections contains the associated data for that section in a standard table format with the following columns: *Changed From*, *Changed To*, *Changed By*, and *Changed On* date columns. You can use the e-mail icon (envelope) to e-mail the *Changed By* staff member if they have an e-mail address associated with their record.
4. Open each section to view the data associated with that section.



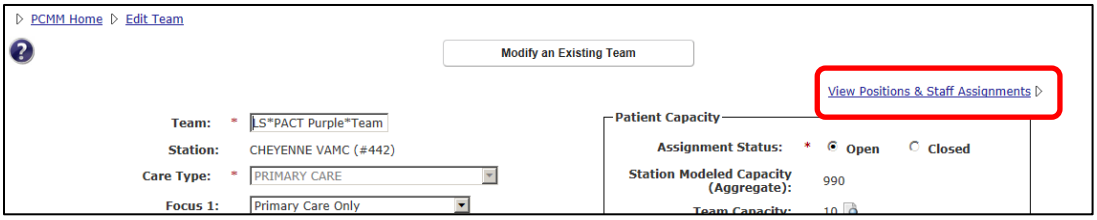
See also:

Update a Team Profile

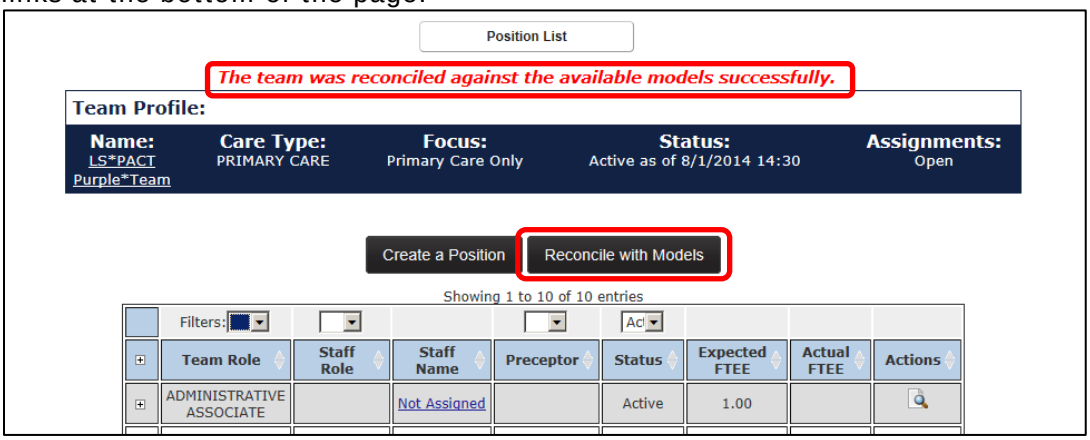
Reconcile Team with Models

After creating a team or a position on a team, you can update your team profile with other available models. ***Note:*** *The team must be active for the system to perform this action.*

1. Locate the desired team to reconcile then go to the *Position List* screen. See the *View a Team Position* section for more information, including how to navigate to this screen.



2. Click the **Reconcile with Models** button to refresh the screen. If reconciliation took place, a confirmation message will appear at the top of the screen. A delete icon will appear in the Actions column for any position that does not match the model. You can view the reconciliation results and the model linked to the team by clicking the links at the bottom of the page.



See Also:

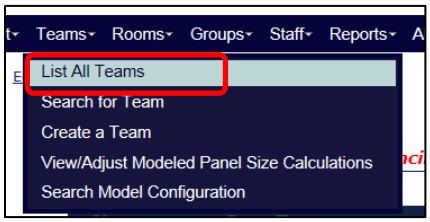
View a Team Position
Remove Staff from a Position

View or Edit Position History

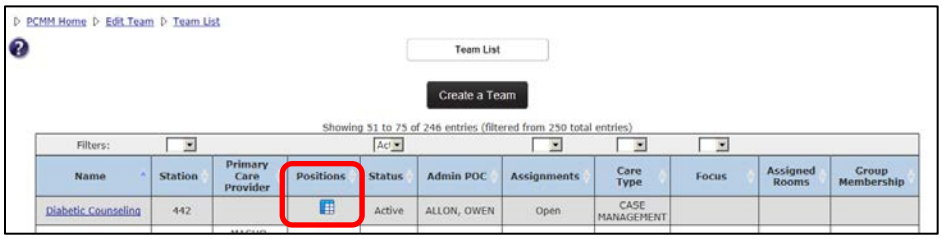
You can view a history of assignments and unassignments for a position.

1. Locate the team desired:

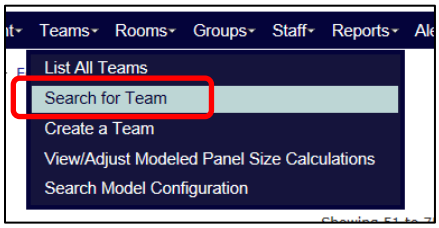
- **From the *Team List* screen:**
  - From the main menu, click **Teams** > **List All Teams**.



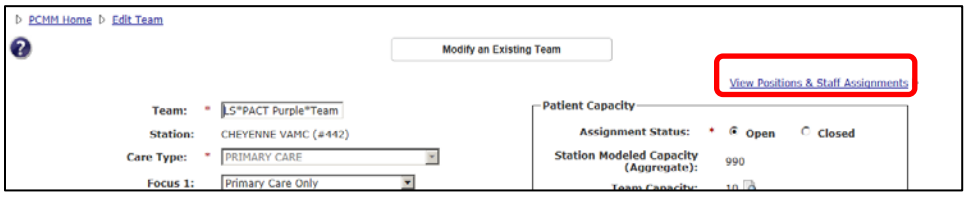
  - Click an item in the **Position** column for the desired team to display the *Positions List* page. The team must be active.



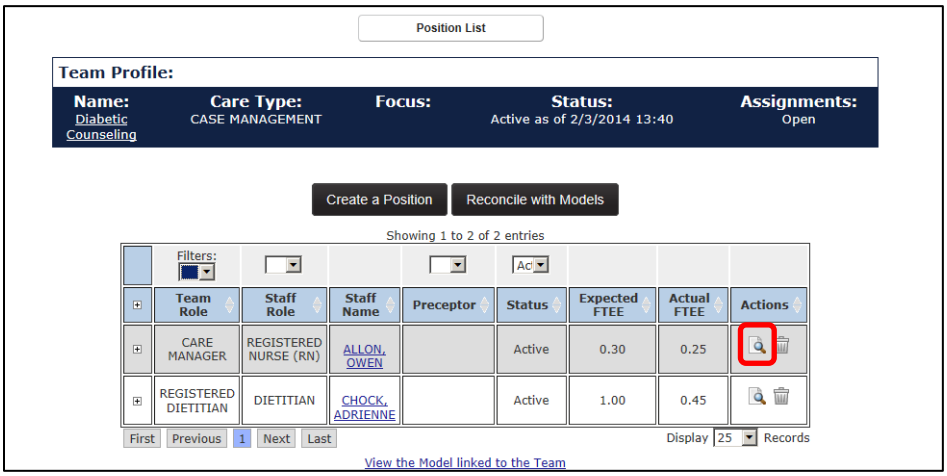
- **From the *Modify an Existing Team* screen:**
  - From the main menu, click **Teams** > **Search for a Team**. Click on the team name. See the *Search for a Team by Name* section for details.



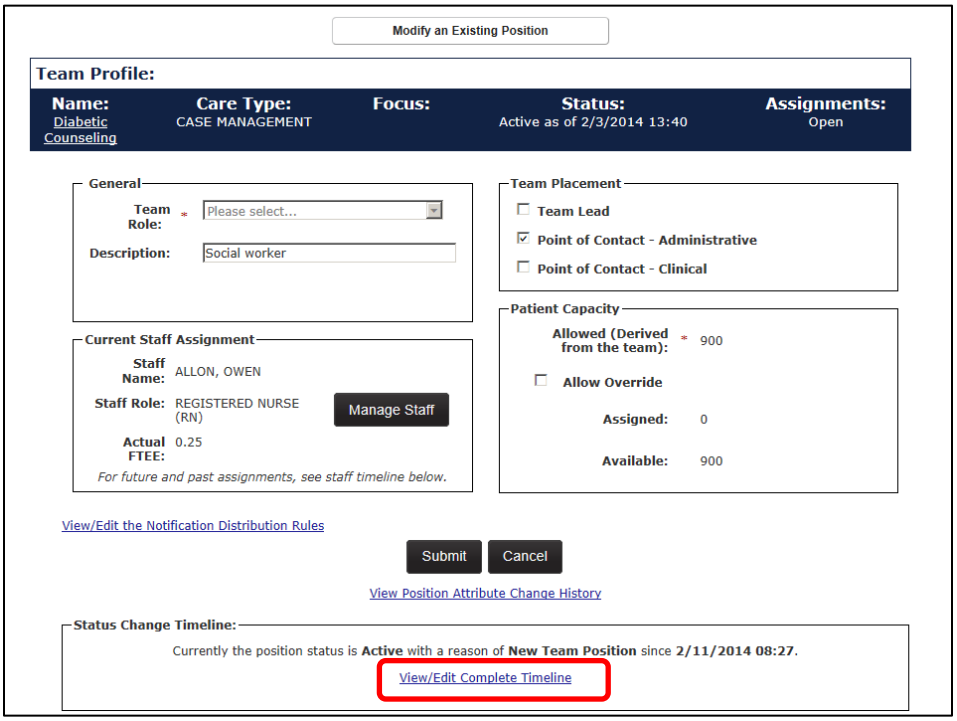
  - From the Modify an Existing Team screen, click *View Positions and Staff Assignments.* The *Position List* page will display.



2. From the *Position List* page, you can click the corresponding icon in the **Actions** column. The *Modify an Existing Team Position* screen will display.

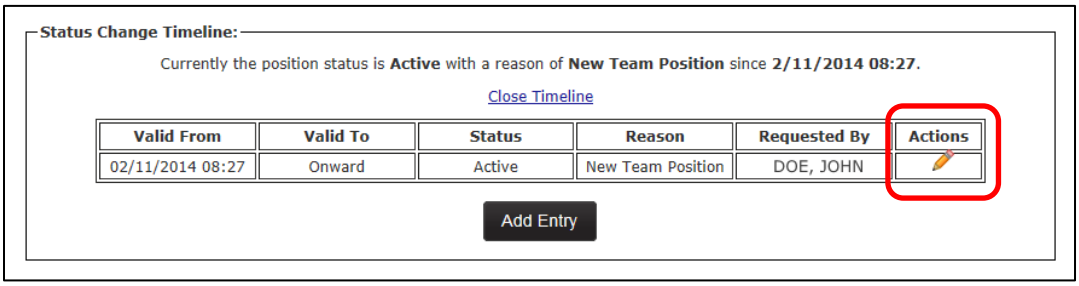


3. In the *Status Change Timeline* section at the bottom of the screen, click the **View/Edit Complete Timeline** link to display the history information.

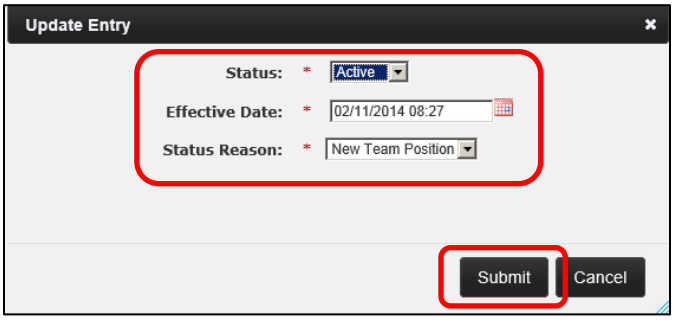


To Update an Existing Entry:

1. You can change the position status to Inactive by clicking the (pencil) icon in the Actions column. The Update Entry dialog box will display.



2. Select a **Status, Effective Date** (current date/time is selected by default, and you cannot choose a past date), and **Status Reason**.
3. Click **Submit** to continue**, Cancel** to cancel. You'll get a confirmation message in the dialog box. Click **Close** to continue. The updated entry will display.



4. Click the **Close Timeline** link to close this section.

To Add an Entry:

1. You can add an entry to the timeline by clicking the **Add Entry** button. The *Add Entry* dialog box will display.

2. Select a **Status, Effective Date** (current date/time is selected by default, and you cannot choose a past date), and **Status Reason**.

3. Click **Submit** to continue, **Cancel** to cancel. You'll get a confirmation message in the dialog box. Click **Close** to continue. The new entry will display in the list.

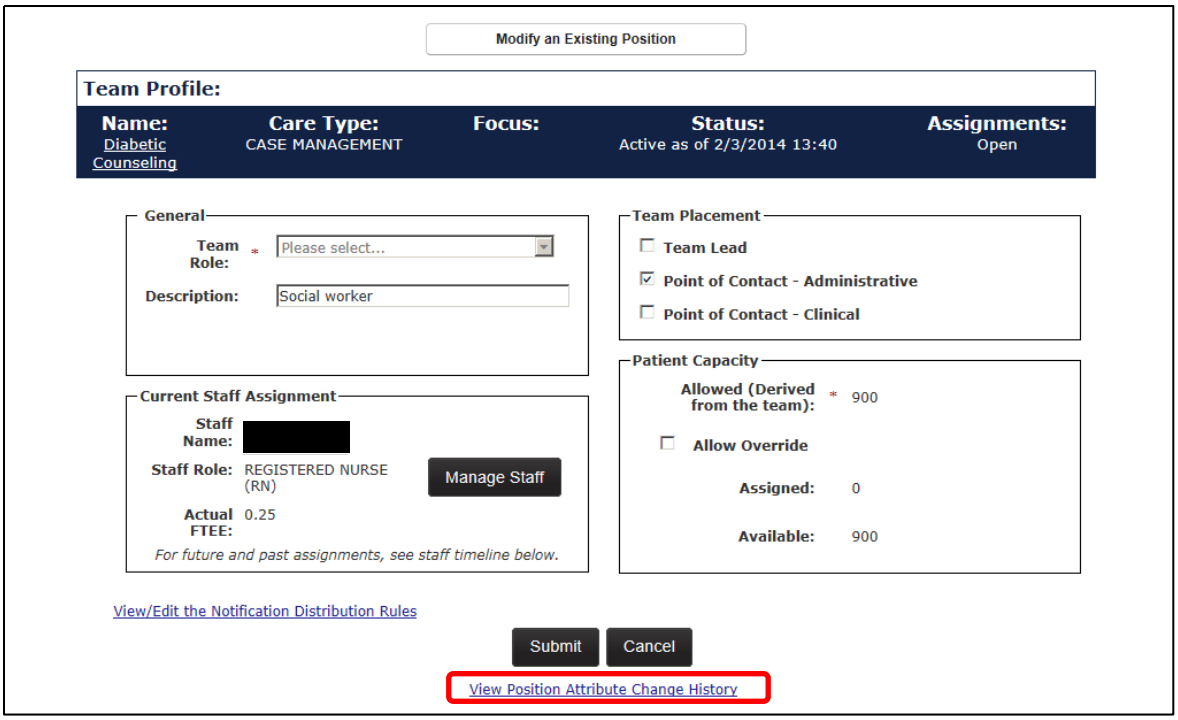
See Also:

Search for VA Staff
Search for Non-VA Provider
Remove Staff from a Position

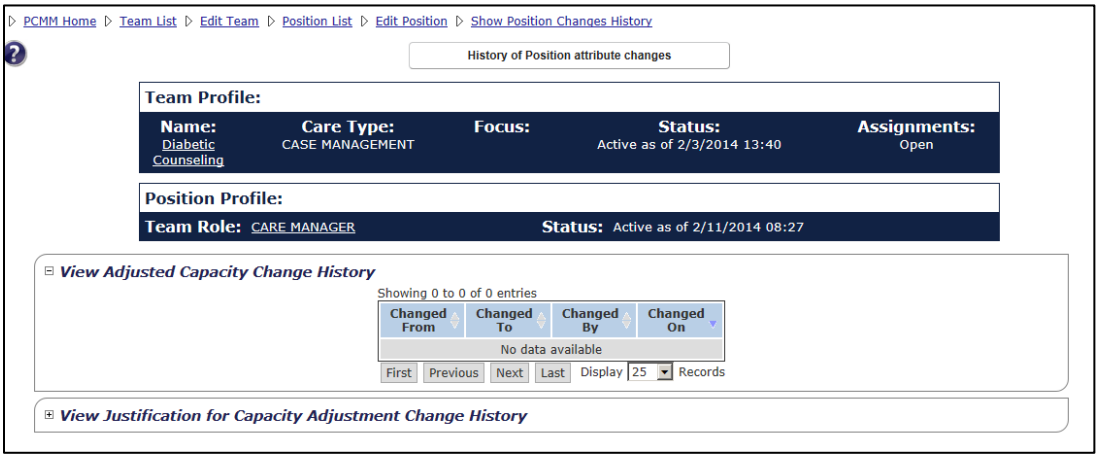
View Position Attribute Change History

You can view the adjusted capacity change history and the justification for capacity adjustment change history from the *History of Position Attribute Changes* screen.

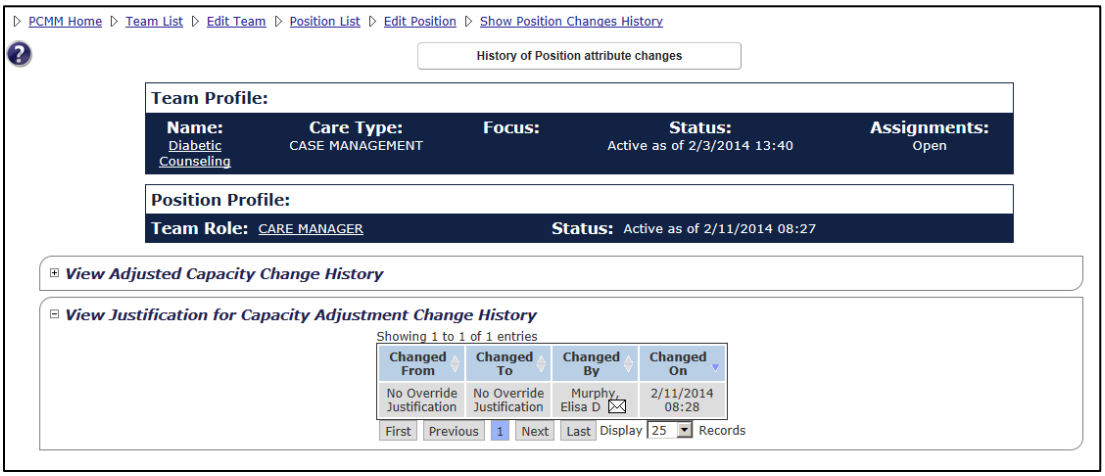
1. From the *Modify an Existing Position* screen (*see the* Update a Position Profile *section for information*), click the **View Position Attribute Change History** link below the *Submit* button.



2. The *History of Position Attribute Changes* screen displays. Open the **Adjusted Capacity Change History** section to view the adjusted capacity change history of the team. This is displayed in a table format with the following columns: *Changed From*, *Changed To*, *Changed By*, and *Changed On* date columns. You can use the e-mail icon (envelope) to e-mail the *Changed By* staff member if they have an e-mail address associated with their record.



3. Open the **Justification for Capacity Adjustment Change History** section to view the justification for the capacity adjustment change history. This is displayed in a table format with the following columns: *Changed From*, *Changed To*, *Changed By*, and *Changed On* date columns. You can use the e-mail icon (envelope) to e-mail the *Changed By* staff member if they have an e-mail address associated with their record.



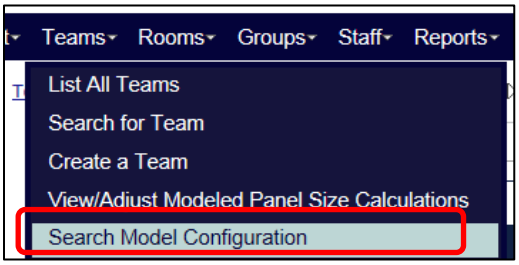
See Also:

[Update a Position Profile]

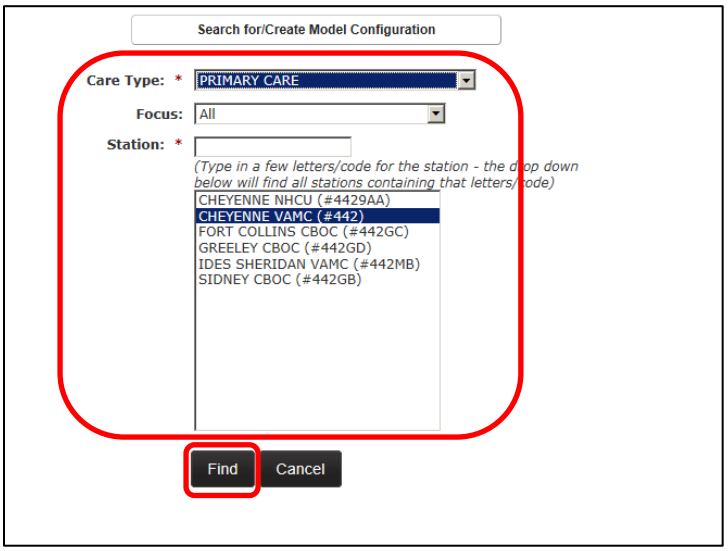
Maintain a Team Model Configuration

This task allows you to search for, or create, a configuration for a team model. Subsequently, you can view and update the configuration for a team model in the system.

1. Select **Teams** > **Search / Maintain Model Configuration** from the main menu to display the *Search for/Create Model Configuration* screen.



2. Select a **Care Type** from the drop-down list.
3. If desired, select a **Focus**.
4. Enter the name of a station or select a station name from the list.
5. Click **Find** to display a list of model configurations at the bottom of the screen. If no configurations are found, a message will display.



6. When you submit and save the team profile for the first time, the system will automatically create the positions defined in the Model Team Configuration. The Model Team Configuration is established at the National level and can be overridden if needed at the station level. It represents the required positions as well as any optional positions that normally exist for the team based on Care Type and Focus (optionally).
    - The system first will check for the existence of a Model Team Configuration for the Team Care Type and the Team Focus for the station number you are logged into. If a Model Team Configuration does not exist for the Team Care

Type and the Team Focus for your station, the National Model Team Configuration will be used.
    - If there is a Model Team Configuration for Team Care Type and not the Team Focus, the Model Team Configuration for the Team Care Type for the station will be used. If there is not a Model Team Configuration for the Team Care Type, the National Team Configuration Model will be used.
    - If there is not a Model Team Configuration in existence at the National level for a Team Care Type, there will not be any positions automatically created.
    - If a Model Team Configuration has been applied to the team, the results of the Team Position creation will be displayed.
7. An alert will be generated and sent to each recipient when a Team is created notifying the user that the Model Team Configuration for a team was created/updated in the Alert Rules for additional information on alert types and who they are sent to.
8. You will have the ability to navigate to the current Model Team Configuration applicable to the team.

Note: *Any positions created by the System will appear in the Team Configuration List along with any positions created by a PCMM user.*

See Also:

Reconcile Team with Models
Create a Team Model Configuration

Create a Team Model Configuration

You can create a new model role for a model team:

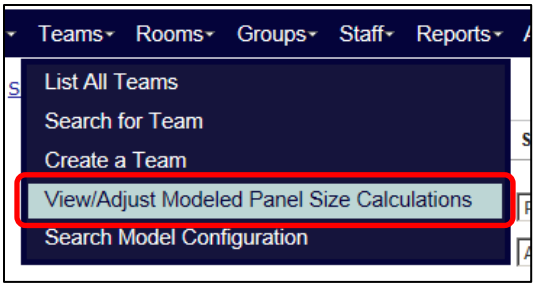
1. **Select Teams** > **Search / Maintain Model Configuration** from the main menu to display the *Search for/Create Model Configuration* screen.
2. The *Create a New Model Role for a Model Team* screen will display.
3. The **Care Type, Focus,** and **Station** will be read-only. Select a **Role** from the drop-down list.
4. Check the **Required** box if the role is to be required for the team.
5. Click the **Yes** button if you choose to notify the PCMM Coordinators of the change. **No** is selected by default.
6. Click **Submit** to continue, **Cancel** to cancel. You will get a confirmation message.

See Also:

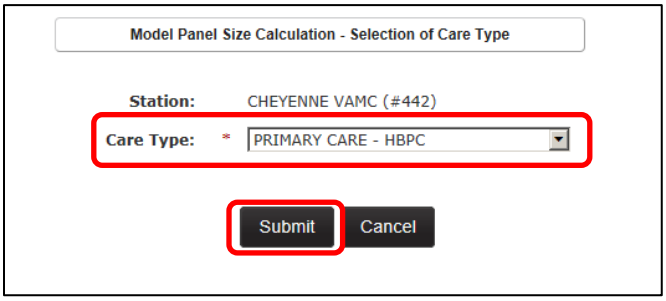
Maintain a Team Model Configuration

Calculate Model Panel Size – Selection of Care Type

1. Select **Teams** > **View / Adjust Modeled Panel Size Calculator** from the main menu to display the *Model Panel Size Calculator – Selection of Care Type* screen.



2. Select a care type from the **Care Type** drop-down menu.
    - Select the **Primary Care** type to display the *Calculate Model Panel Size – Primary Care* Worksheet screen
    - Select any other care type to display the *Model Panel Size Calculation – Adjustment of Model Capacity* screen.
3. Click **Submit** to continue, **Cancel** to cancel.



See Also:

Calculate Model Panel Size - Primary Care Worksheet
Calculate Model Panel Size - Adjust Capacity

Calculate Model Panel Size - Primary Care Worksheet

You can calculate the model panel size for a Primary Care team through the *Primary Care Worksheet* screen.

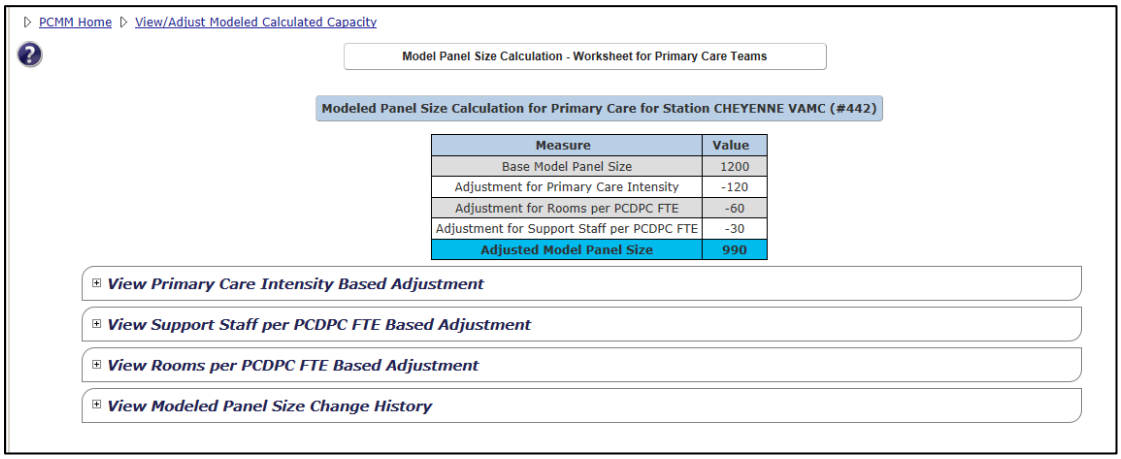
If you have selected the **Primary Care** type from the *View/Adjust Modeled Panel Size Calculator* screen, the *Calculate Model Panel Size – Primary Care Worksheet* screen will display. *See the* Calculate Model Panel Size - Select Care Type *section for more information on how to navigate to this screen.*

The data is displayed in a table with two columns: *Measure* and *Value*. The last column lists the final *Adjusted Model Panel Size*.

In addition, you can view information by clicking the toggle control for the tables below:

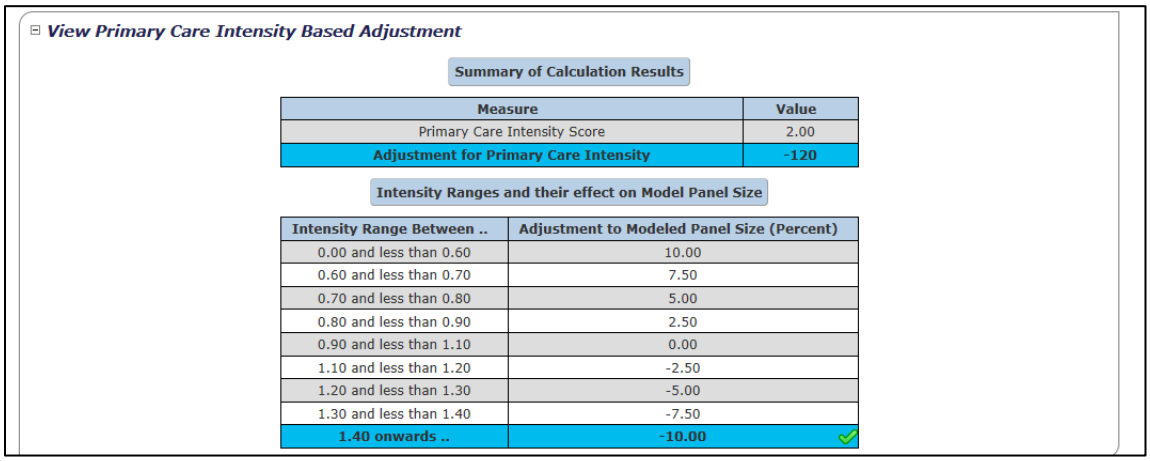
- View Primary Care Intensity Based Adjustment
- View Support Staff per PC FTEE Based Adjustment

- View Rooms per PC FTEE Based Adjustment
- View Modeled Panel Size Change History



View Primary Care Intensity Based Adjustment

The table in this section displays a *summary of calculation results*, including measure, value, intensity ranges and their effect on Model Panel Size, and the Adjustment of Modeled Panel size in percent. An icon (green check) displays at the end if the percentage is within range.



View Primary Care Intensity Based Adjustment

Summary of Calculation Results

Measure	Value
Primary Care Intensity Score	2.00
Adjustment for Primary Care Intensity	**-120**

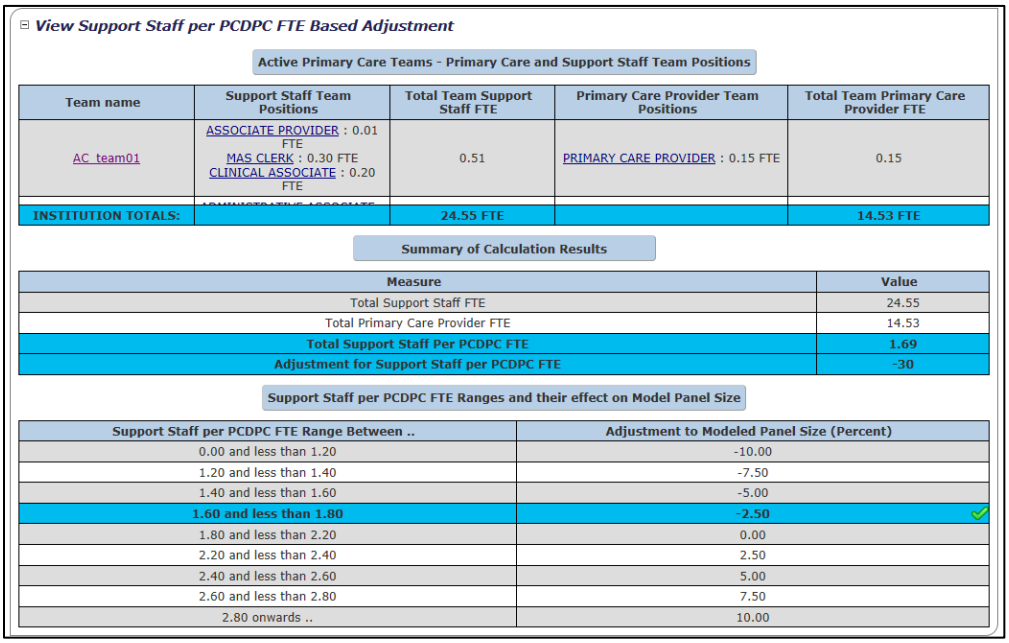
Intensity Ranges and their effect on Model Panel Size

Intensity Range Between ..	Adjustment to Modeled Panel Size (Percent)
0.00 and less than 0.60	10.00
0.60 and less than 0.70	7.50
0.70 and less than 0.80	5.00
0.80 and less than 0.90	2.50
0.90 and less than 1.10	0.00
1.10 and less than 1.20	-2.50
1.20 and less than 1.30	-5.00
1.30 and less than 1.40	-7.50
1.40 onwards ..	**-10.00**

View Support Staff per PC FTEE Based Adjustment

The table in this section lists the Active Primary Care teams for the station with their PC and Support Staff Team Positions. Table data includes *Team name, Support Staff Team Positions, Total Team Support Staff FTE, Primary Care Provider Team Positions,* and *Total Team Primary Care Provider FTE*.

- Click a team name link in the **Team Name** column to open the *Modify an Existing Team screen* for that team.
- Click a position link in the **Support Staff Team Positions** column to open the *Modify an Existing Position* screen for that position for that team.
- Click a Primary Care position link in the **Primary Care Provider Team Positions** column to open the *Modify an Existing Position* screen for that Primary Care position for that team.



View Support Staff per PCDPC FTE Based Adjustment

Active Primary Care Teams - Primary Care and Support Staff Team Positions

Team name	Support Staff Team Positions	Total Team Support Staff FTE	Primary Care Provider Team Positions	Total Team Primary Care Provider FTE
AC_team01	ASSOCIATE PROVIDER : 0.01 FTE MAS CLERK : 0.30 FTE CLINICAL ASSOCIATE : 0.20 FTE	0.51	PRIMARY CARE PROVIDER : 0.15 FTE	0.15
INSTITUTION TOTALS:		24.55 FTE		14.53 FTE

Summary of Calculation Results

Measure	Value
Total Support Staff FTE	24.55
Total Primary Care Provider FTE	14.53
Total Support Staff Per PCDPC FTE	1.69
Adjustment for Support Staff per PCDPC FTE	-30

Support Staff per PCDPC FTE Ranges and their effect on Model Panel Size

Support Staff per PCDPC FTE Range Between ..	Adjustment to Modeled Panel Size (Percent)
0.00 and less than 1.20	-10.00
1.20 and less than 1.40	-7.50
1.40 and less than 1.60	-5.00
1.60 and less than 1.80	-2.50
1.80 and less than 2.20	0.00
2.20 and less than 2.40	2.50
2.40 and less than 2.60	5.00
2.60 and less than 2.80	7.50
2.80 onwards ..	10.00

At the bottom of the table are displayed the *Summary of Calculation Results*, the associated table with *measure and value* columns, and the *Support Staff per PC FTEE Ranges and their effect on Model Panel Size*.

View Rooms per PC FTEE Based Adjustment

The table in this section displays the Active Primary Care Teams with Room Assignments data with the following columns: *Team Name, Examination Room Assignments, Interview Room Assignments,* and *Total Room Assignments* for the team.

- Click a team name link in the **Team Name** column to open the *Modify an Existing Team* screen for that team.
- Click on an **Examination Room Assignments** link, if available, to go to the *Modify an Existing Room* screen.
- At the bottom of the list is displayed the Institution Totals (FTE)

At the bottom of the table are displayed the *Summary of Calculation Results*, the associated table with *measure* and *value* columns, the *Total Rooms per PC Provider FTEE*, and the *Adjustment*. The last table displays the *Rooms per PC FTEE Ranges and their effect on Model Panel Size*: the columns displayed are *Rooms per PC FTEE Range Between...* and *Adjustment to Modeled Panel Size in Percent*.

View Rooms per PCDPC FTE Based Adjustment

Active Primary Care Teams with Room Assignments

Team Name	Examination Room Assignments	Interview Room Assignments	Total Room Assignments for the team
AC_team01	1007 : 0.10 FTE 1006 : 0.10 FTE 1008 : 0.10 FTE 1005 : 0.10 FTE		0.40 FTE
INSTITUTION TOTALS:	4.13 FTE	1.60 FTE	5.73 FTE

Summary of Calculation Results

Measure	Value
Total Examination Rooms FTE - Assigned to Primary Care Teams	4.13
Total Interview Rooms FTE - Assigned to Primary Care Teams	1.60
Total Rooms FTE - Assigned to Primary Care Teams	5.73
Total PCDPC FTE	14.53
Total Rooms Per PCDPC FTE	**0.39**
Adjustment for Rooms per PCDPC FTE	**-60**

Rooms per PCDPC FTE Ranges and their effect on Model Panel Size

Rooms per PCDPC FTE Range Between ..	Adjustment to Modeled Panel Size (Percent)
0.00 and less than 2.00	**-5.00**
2.00 and less than 2.75	-2.50
2.75 and less than 3.25	0.00
3.25 and less than 3.75	2.50
3.75 onwards ..	5.00

View Modeled Panel Size Change History

The compilation table in this section displays the following columns: *Model Size, Start Date, End Date, Primary Care Intensity, Intensity Based Adjustment, Total Support Staff FTE, Total PC FTE, Support Staff per PC FTE, Support Staff Based Adjustment, Total Rooms FTE, Rooms per PC FTE,* and the *Rooms Based Adjustment.*

View Modeled Panel Size Change History

Model Size	Start Date	End Date	Primary Care Intensity	Intensity Based Adjustment	Total Support Staff FTE	Total PCDPC FTE	Support Staff Per PCDPC FTE	Support Staff Based Adjustment	Total Rooms FTE	Rooms Per PCDPC FTE	Rooms Based Adjustment
990	9/26/2014 11:27	Onwards	2.00	-120	24.65	14.64	1.68	-30	5.73	0.39	-60
960	9/18/2014 11:00	9/26/2014 11:27	2.00	-120	24.64	15.62	1.58	-60	4.65	0.30	-60

See Also:

Calculate Model Panel Size - Select Care Type
Calculate Model Panel Size - Adjust Capacity

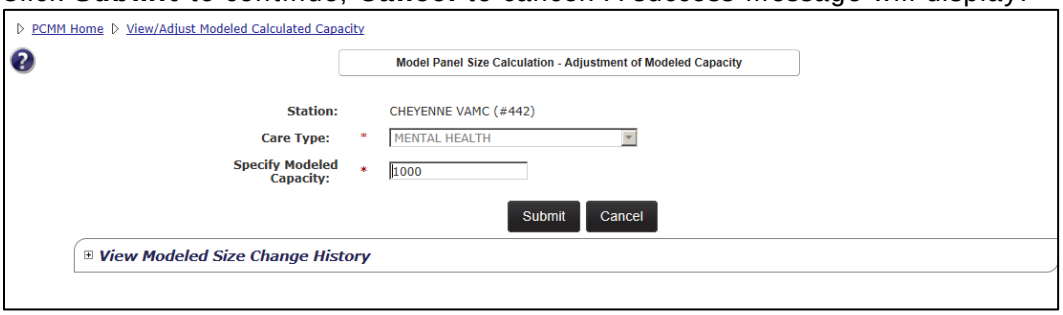
Calculate Model Panel Size -Adjust Capacity

You can calculate the model panel size for a team other than a Primary Care team through the Model Panel Size Calculation – Adjustment of Modeled Capacity screen.

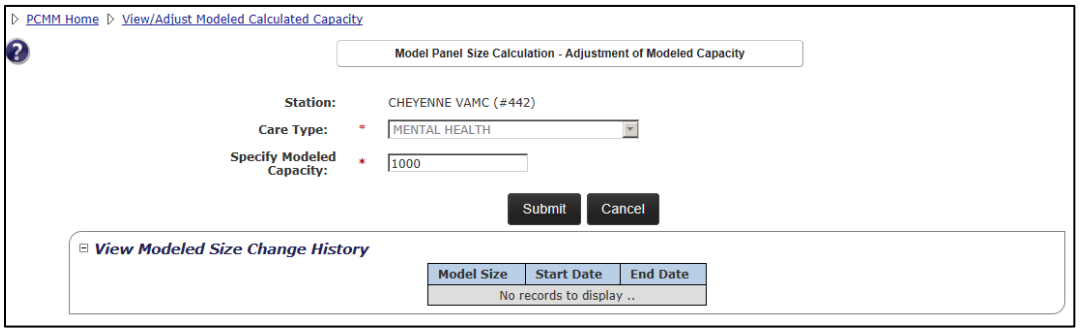
If you have selected a type **other** than the *Primary Care* type from the *View/Adjust*

Modeled Panel Size Calculator screen, the *Model Panel Size Calculation - Adjustment of Modeled Capacity* screen will display. *See the* Calculate Model Panel Size - Select Care Type *section for more information on how to navigate to this screen.*

1. The **Station** and **Care Type** is read-only.
2. Enter a number for the **Specify Modeled Capacity** box if you want to change it (the most current number is the default).
3. Click **Submit** to continue, **Cancel** to cancel. A success message will display.



You can view the **Modeled Size Change History** by clicking the toggle control to display the table data. The table contains three columns: *Model Size, Start Date* and *End Date*, if available. This is a read-only table.



See Also:

Calculate Model Panel Size - Select Care Type
Calculate Model Panel Size - Primary Care Worksheet

Update Primary Care Intensity

Users with the role of National Coordinator can update the primary care intensity score for a station so that it can be used to adjust the modeled team capacity calculations at a station and team level.

1. From the main menu, select **Teams** > **Update Primary Care Intensity** from the main menu to display the **Update Primary Care Intensity** screen. The station you are currently signed into appears in the Station field and is read-only.
2. Update the value in the **Primary Care Intensity** field (**X.XX** format).
3. Click **Submit** to save the change or **Cancel** to return to the PCMM home page without saving the change. A confirmation message will display.

Note: *If the Primary Care Intensity is changed, individual team modeled capacities may be automatically changed by the system.*

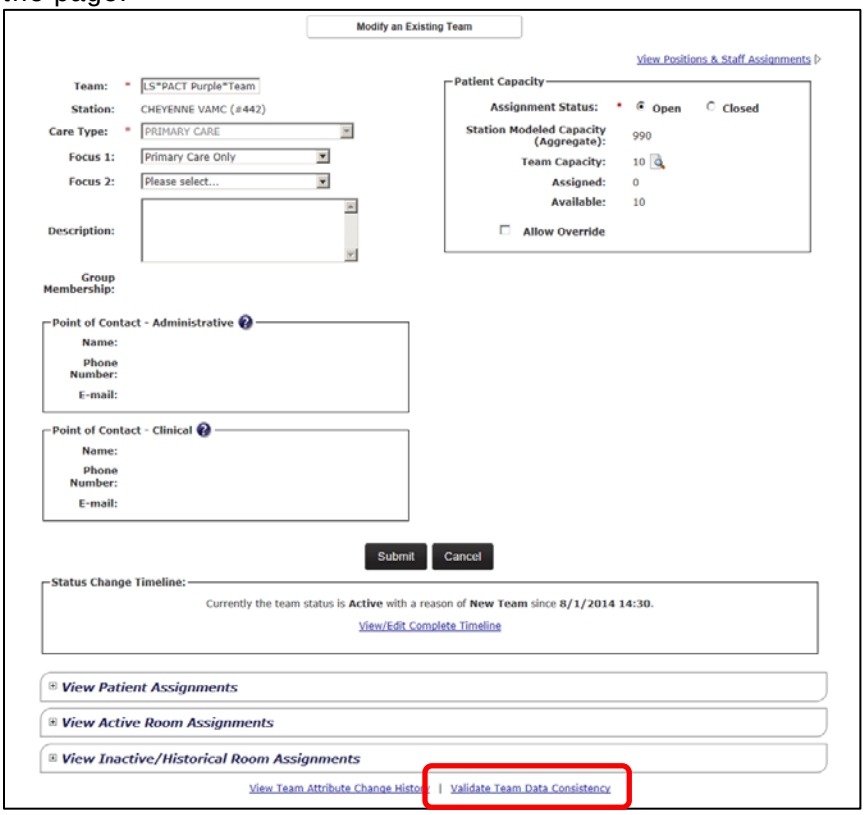
See Also:

Calculate Model Panel Size - Primary Care Worksheet

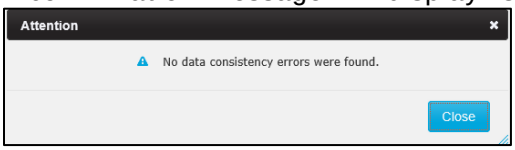
Validate Team Data Consistency

You can check for data consistency errors:

1. From the **Modify an Existing Team** screen (*See* Search for a Team by Name *section*), click the **Validate Team Data Consistency** link located at the bottom of the page.



2. A confirmation message will display. Click **Close**.



See Also:

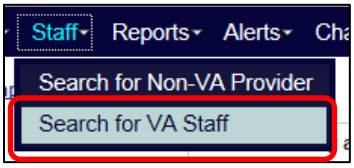
Search for a Team by Name
Update a Team Profile

STAFF MANAGEMENT

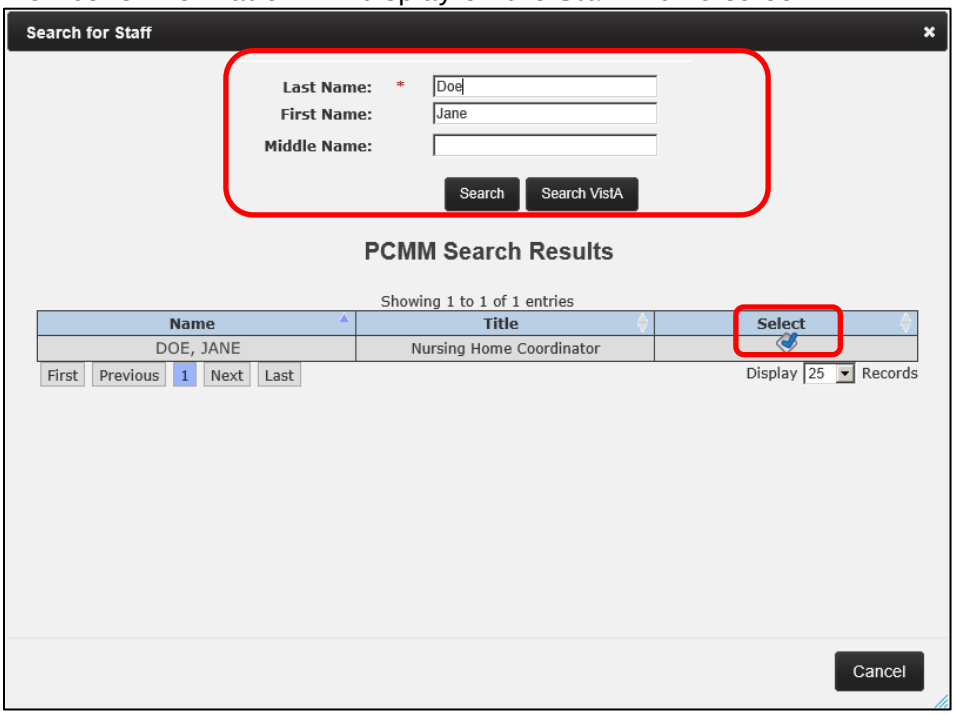
Search for VA Staff

This task allows you to search for a VA staff member.

1. Select **Staff** > **Search for VA Staff** from the main menu to display the *Search for Staff* window.



2. Enter at least three characters of a last name for the staff member. Entering first or middle names will narrow the search.
3. Click **Search** to display a list of staff names below the *Search* button. You can click **Cancel** to cancel the search.
4. Click the icon in the **Select** column that corresponds to the name desired. The staff member's information will display on the *Staff Profile* screen.



If the system cannot find a staff member:

1. If the system cannot find a record, a message will display in the *Search for Staff* window. Click the **Find in VistA** button to search for the staff member in VistA. You also use this method for finding staff members in VistA that don't appear in the PCMM Search results list. VistA requires at least three letters of the last name to perform a search. Enter the search criteria and select the **Find in VistA** button.

2. The screen will refresh with the VistA results display. Click the icon in the **Select** column that corresponds to the name desired.
3. The staff member information will display on the *Staff Profile* screen. The results list will display the *Provider Name, Category, Practice Name, Specialty, Practice City,* and *Practice State*. The list can be sorted by any column or narrowed by using a filter for **Category**, or **Specialty**.

If the VA Provider has an email, you can click the e-mail icon to start your e-mail client with the contact's email address in the *To:* field.

See also:

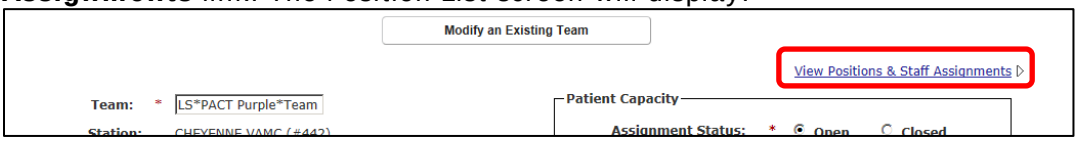
Assign Staff to a Position
Reassign/Change Staff Assignment
Remove Staff from a Position
Search for Non-VA Provider
Create a Non-VA Provider
Update an Existing non-VA Provider

Assign Staff to a Position

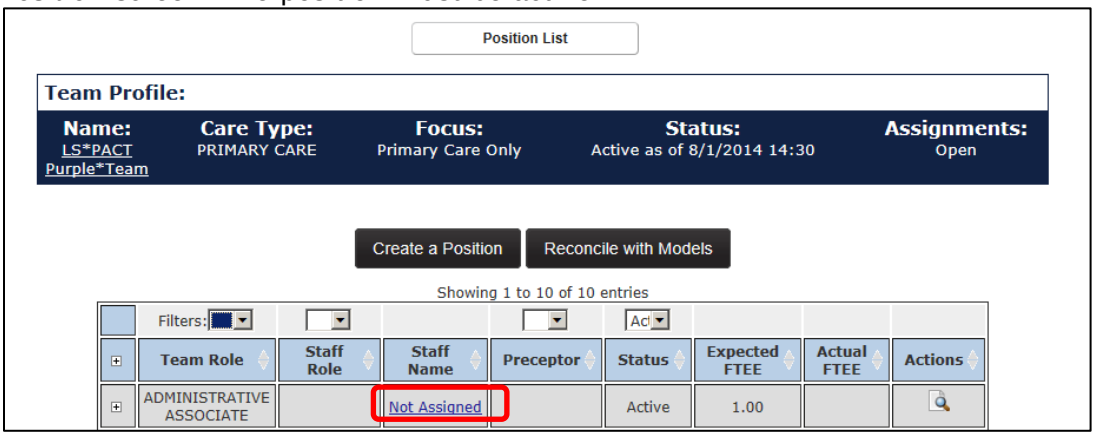
To assign staff to a position:

From the Position List screen:

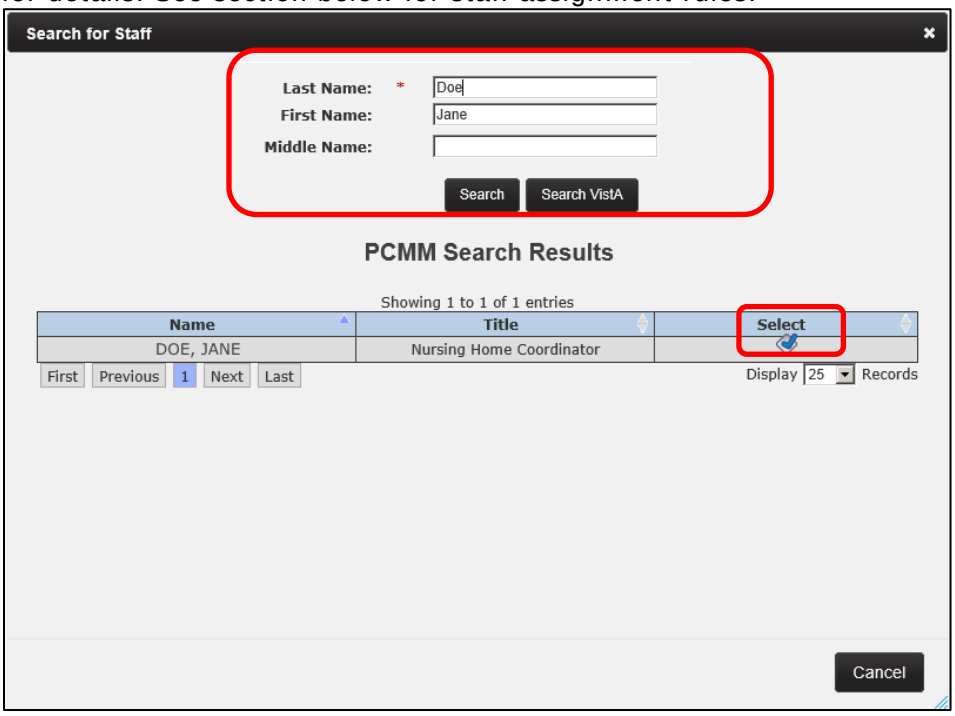
1. From the *Modify an Existing Team* page, click the **View Positions and Staff Assignments** link. The Position List screen will display.



2. Click a **Not Assigned** link in the *Staff Name* column to display the *Assign Staff to a Position* screen. The position must be active.



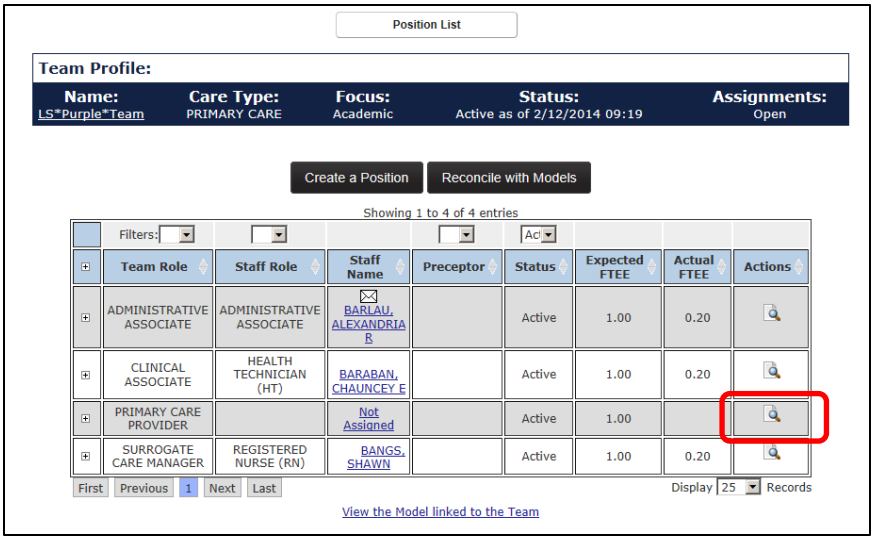
3. Enter the first 3 letters of a staff member's name and click **Search**. If no staff member is found, click the **Search VistA** button. See the *Search for VA Staff* section for details. See section below for staff assignment rules.



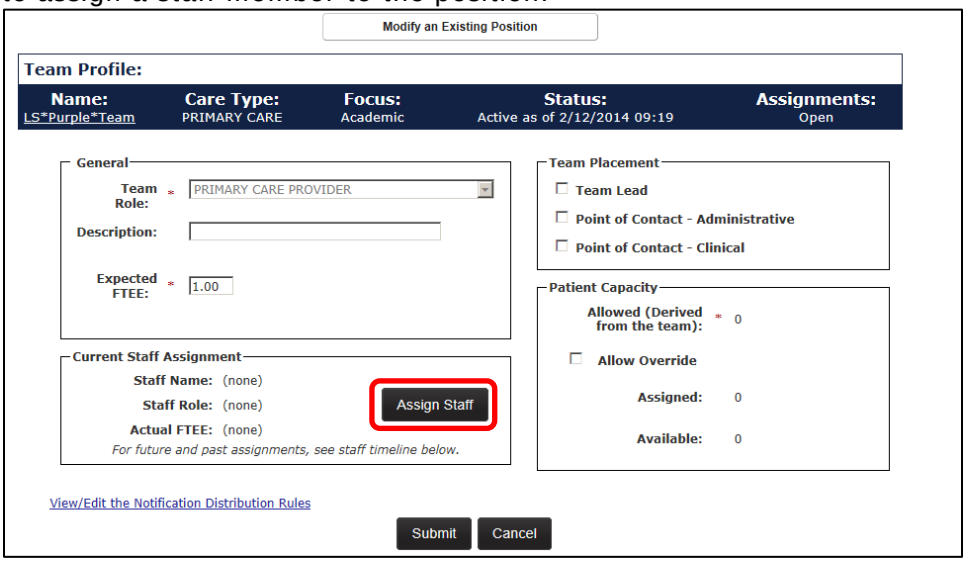
4. Staff member information will display. Enter an **Assignment Date** and an **FTEE** number, if required. The **Assignment Date** will be defaulted to the current date and will allow you to override, but not prior to the position's creation date. The FTEE represents the actual FTEE the staff member assigned to this position has the ability to provide. The FTEE for the staff member assigned to this position cannot be greater than 1.00 across all positions/teams to which he or she is assigned within a station or within station(s) with the same first three digits of the station number (i.e., the parent station).
5. Click **Submit** to continue, **Cancel** to cancel. You'll get a success message and the staff member's name will display in the *Staff Name* column.

From the Modify an Existing Position screen:

1. From the *Modify an Existing Team* page, click **View Positions and Staff Assignments**. The *Position List* page displays. Click magnifying glass icon in the **Actions** column that corresponds to the position you want to staff.

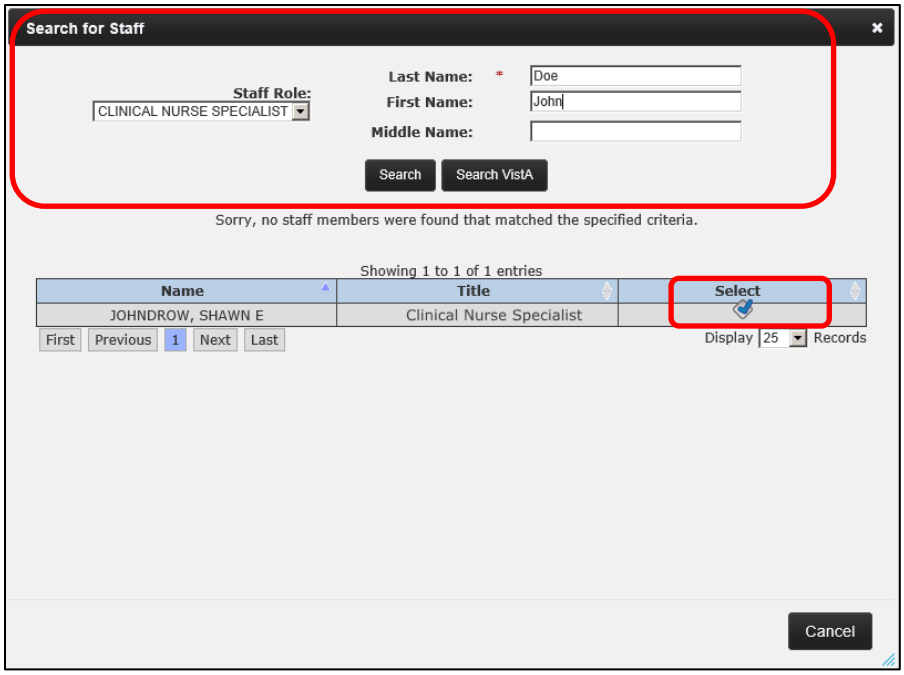


2. The *Modify an Existing Position* screen will display. The *Current Staff Assignment* section will display *Staff Name, Role* and *Actual FTEE*. Click the **Assign Staff** button to assign a staff member to the position.



3. The *Search for Staff* dialog box displays. The *Staff Role* is displayed and can be edited.
   - ***Note:*** *If the Staff Role has been indicated for the position, the staff member must be valid for the Staff Role in order for the assignment to occur. If the Staff Role has not been indicated for the position, and if the role indicated for the position has a position(s) associated with it, the staff member must be valid for the Staff Role Provider Type(s) in order for the assignment to occur.*
4. Follow the steps described above to assign the staff member to the position.

- When the assignment is created; the assignment date/status/reason will be captured in History.



Mental Health Team Specifics:

When assigning a staff member to a mental health team, each staff member is allowed to be assigned to more than one position on the same team. This is needed since the staff member may serve as Mental Health Treatment Coordinator (MHTC) to some patents and not others.

See Also:

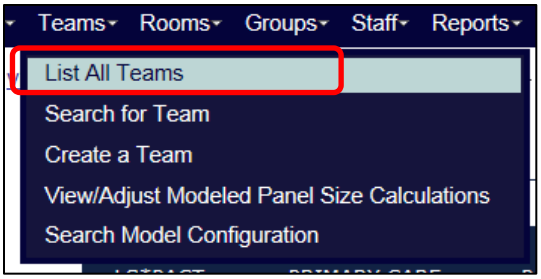
Search for VA Staff
Reassign/Change Staff Assignment
Remove Staff from a Position
Search for Non-VA Provider
Create a Non-VA Provider
Update an Existing non-VA Provider
Preceptor/Preceptee Relationships

Remove/Un-assign Staff from a Position

You can remove staff from a position from the Position List screen. The associated team must have an active status.

From the Team List screen:

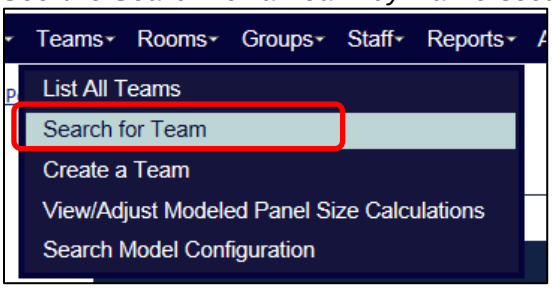
1. From the main menu, click **Teams** > **List All Teams**.



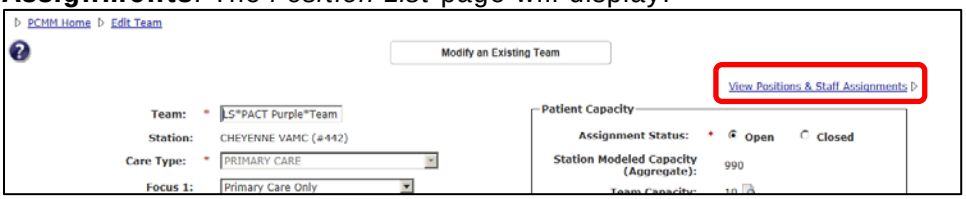
2. Click on a team name. See the *Search for a Team by Name* section for details. From the *Modify an Existing Team* screen, click **View Positions and Staff Assignments**. The *Position List* page will display.

From the Modify an Existing Team screen:

1. From the main menu, click **Teams** > **Search for a Team**. Click on the team name. See the *Search for a Team by Name* section for details.



2. From the *Modify an Existing Team* screen, click **View Positions and Staff Assignments**. The *Position List* page will display.



Alternatively, from the *Position List* page, you can click the corresponding icon in the **Actions** column. Click the **Manage Staff** button in the *Current Staff Assignments* section.

1. Click a name in the **Staff Name** column to display the *Assign Staff to a Position* page.
2. Click the **Un-assign** button to remove the staff member name and profile from the position.
3. Enter the effective date of the un-assignment (current date and time is displayed by default). Choose an **Un-assignment Reason** from the drop down list.
4. Click the **Submit** button to confirm the un-assignment, or **Cancel** to cancel.
5. When the un-assignment occurs, the un-assignment date/status/reason will be captured in History with who requested the change and when.

Note: *If the position is a preceptee that has a preceptor assigned, the position may not be de-staffed until the preceptor relationship is terminated. You will be presented with a message letting you know this position has a preceptee and this position cannot be de-staffed without first unassigning the preceptee.*

See Also:

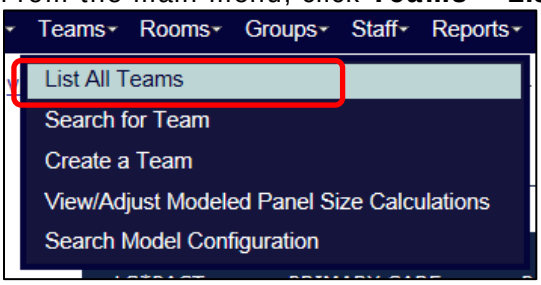
Search for a Team by Name
Search for VA Staff
Assign Staff to a Position
Reassign/Change Staff Assignment
Search for Non-VA Provider
Create a Non-VA Provider
Update an Existing non-VA Provider

Reassign/Change Staff Assignment

You can reassign or change staff assignments from the Position List screen. The associated team must have an active status.

From the Team List screen:

1. From the main menu, click **Teams** > **List All Teams**.



2. Click an item in the **Position** column for the desired team to display the *Positions List* page. The team must be active.

From the Modify an Existing Team screen:

1. From the main menu, click **Teams** > **Search for a Team**. Click on the team name. See the *Search for a Team by Name* section for details.
2. From the *Modify an Existing Team* screen, click **View Positions and Staff Assignments**. The *Position List* page will display.

Alternatively, from the *Position List* page, you can click the corresponding icon in the **Actions** column. Click the **Manage Staff** button in the Current Staff Assignments section.

1. Click a name in the **Staff Name** column to display the *Assign Staff to a Position* page.
2. Click the **Reassign** button. The *Search for Staff* dialog box will appear.
3. Enter at least three characters of a last name for the staff member. Entering first or middle names will narrow the search. Click **Search**. If the system cannot find the staff member, click the **Search VistA** button. See the *Search for VA Staff* section for detailed information.
4. Click the corresponding icon in the **Select** column. The *Staff Information* dialog box will display. You can start the search process again if you choose to select another staff member. Click the **Search Staff** button to proceed with this process.
5. Enter the effective date of the reassignment (current date and time is displayed by default).
6. Enter the **FTEE** (current FTEE is displayed by default).
7. Click the **Submit** button to confirm the reassignment, or **Cancel** to cancel. The *Modify an Existing Position* screen will display and the new Current Staff member's information will display.
8. When the reassignment occurs, the reassignment date/status/reason will be captured in History with who requested the change and when.

Note: *If the position is a preceptee that has a preceptor assigned, the position may not be de-staffed until the preceptor relationship is terminated. You will be presented with a message letting you know this position has a preceptee and this position cannot be de-staffed without first un-assigning the preceptee.*

See Also:

Search for a Team by Name
Search for VA Staff
Assign Staff to a Position
Remove Staff from a Position
Search for Non-VA Provider
Create a Non-VA Provider
Update an Existing non-VA Provider

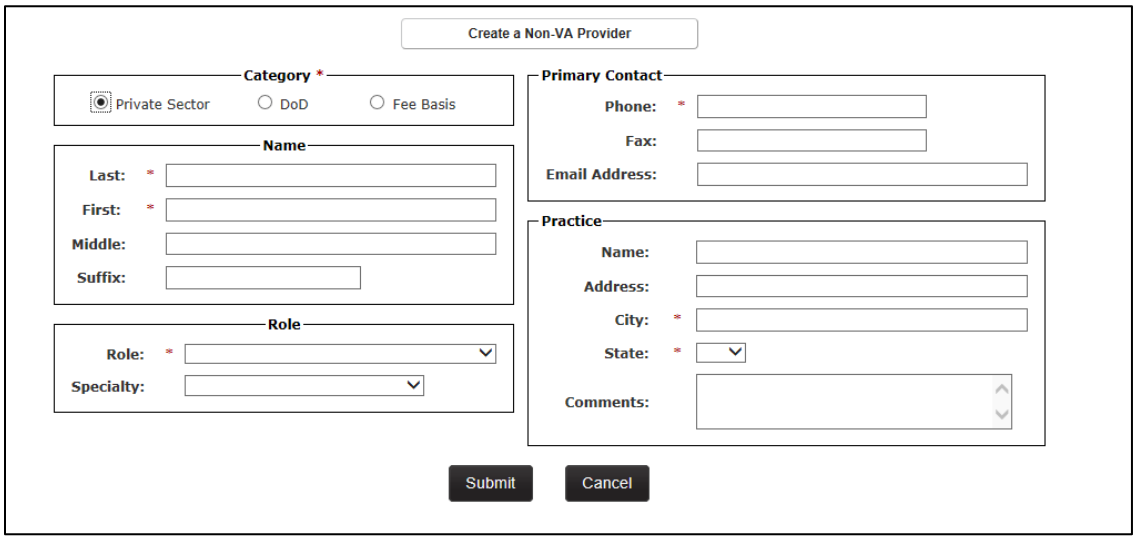
Create a Non-VA Provider

This task allows you to enter a new Non-VA provider's information into the PCMM system.

1. If the name for a Non-VA Provider is not found in the system (See *Search for a Non-VA Provider* section), a *Confirm Create Non-VA Provider* dialog box will appear. If you wish to create a Non-VA Provider, click **Yes** to display the *Create Non-VA Provider* screen. If not, click **No** to return to the *Search for Non-VA Provider* screen.
2. Confirm the selection of the provider **Category**.
3. Enter the Non-VA provider's **Name** which includes Last, First, Middle name and suffix, if applicable. Last and First Names are required.
4. Select a **Role** from the drop-down list (required).
5. You may select a **Specialty** from the drop-down list.
6. Enter a phone number for the **Primary Contact** (required). You may also enter a **Fax** or **Email** address.
7. You may enter a **Practice Name** and **Address**.
8. You must enter a **City** name and select a **State** from the drop-down list (both required).
9. You may enter comments in the **Comments** text box.
10. Click **Submit** to save the information and display the *Non-VA Provider Information* screen. The new provider will be listed. Or you may click **Cancel** to display a dialog box that asks you to confirm your cancelation and warns that no information will be saved. If you confirm your cancelation, you will be returned to the *Search for Non-VA Provider* screen.

If the Non-VA Provider has an email, you can click the e-mail icon that corresponds to the provider name you want. This will start your e-mail client with the contact's email address in the *To:* field.

The *Non-VA Provider* screen displays the *Provider Name, Category, Practice Name, Specialty, Practice City*, and *Practice State*. You can click the link in a **Provider Name** field to view and/or edit the provider's information through the *Modify a Non-VA Provider* screen.



See Also:

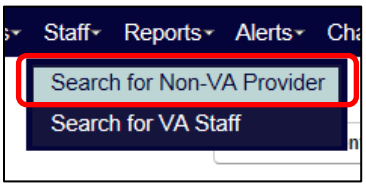
Search for VA Staff
Assign Staff to a Position
Reassign/Change Staff Assignment

Remove Staff from a Position
Search for Non-VA Provider
Update an Existing non-VA Provider

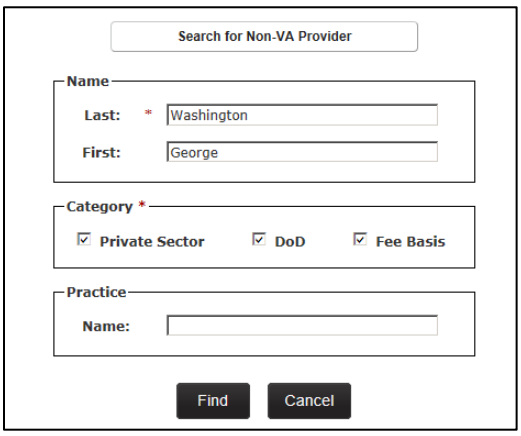
Search for a Non-VA Provider

You can search for a Non-VA Provider in the PCMM system in order to view and update provider information. If you do not find a Non-VA Provider, you can create a new Non-VA provider profile.

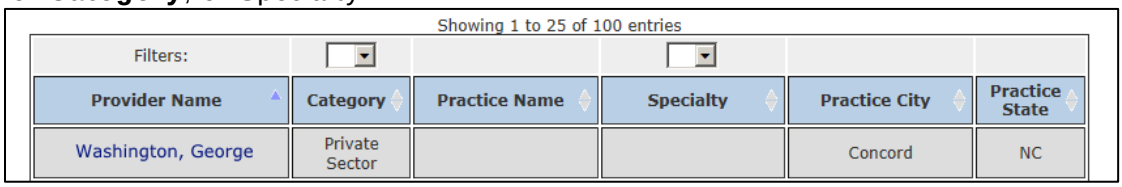
1. Select **Staff** > **Search for Non-VA Provider** from the main menu to display the *Search for Non-VA Provider* screen.



2. Enter at least two characters of a last name for the Non-VA Provider. Entering a first name will narrow the search.
3. Confirm the **Category** selection for the type of *Non-VA Provider*.
4. You may enter a practice name.
5. Click **Find** to display search results. If a *Non-VA Provider* is not found, a **Confirm Create Non-VA Provider** dialog box will appear. If you wish to create a Non-VA Provider, click **Yes** to display the *Create Non-VA Provider* screen. You can also click **No** to return to the *Search for Non-VA Provider* screen.



The Results list will display the *Provider Name, Category, Practice Name, Specialty, Practice City,* and *Practice State*. The list can be sorted by any column or narrowed by using a filter for **Category**, or Specialty.



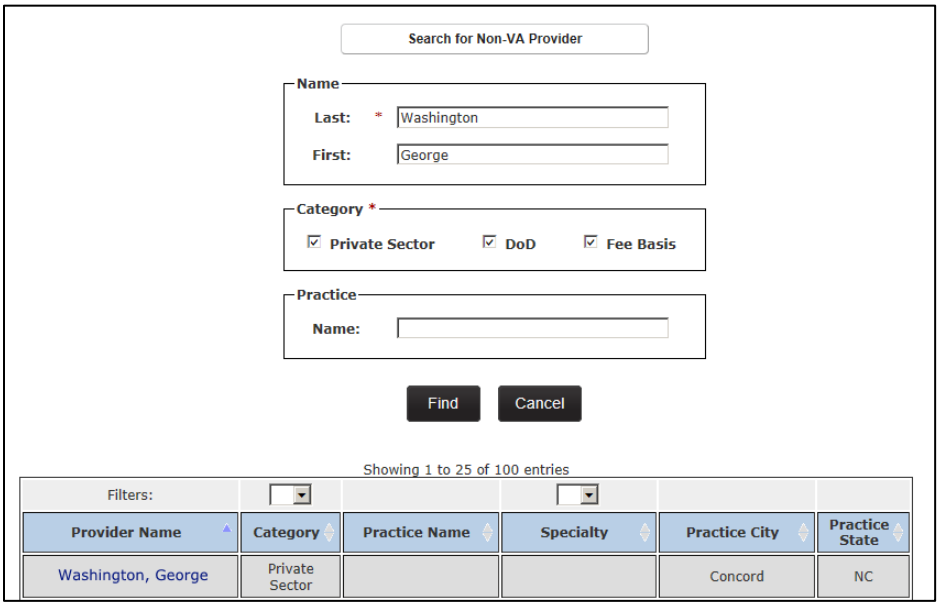
See Also:

Search for VA Staff
Assign Staff to a Position
Reassign/Change Staff Assignment
Remove Staff from a Position
Create a Non-VA Provider
Update an Existing non-VA Provider

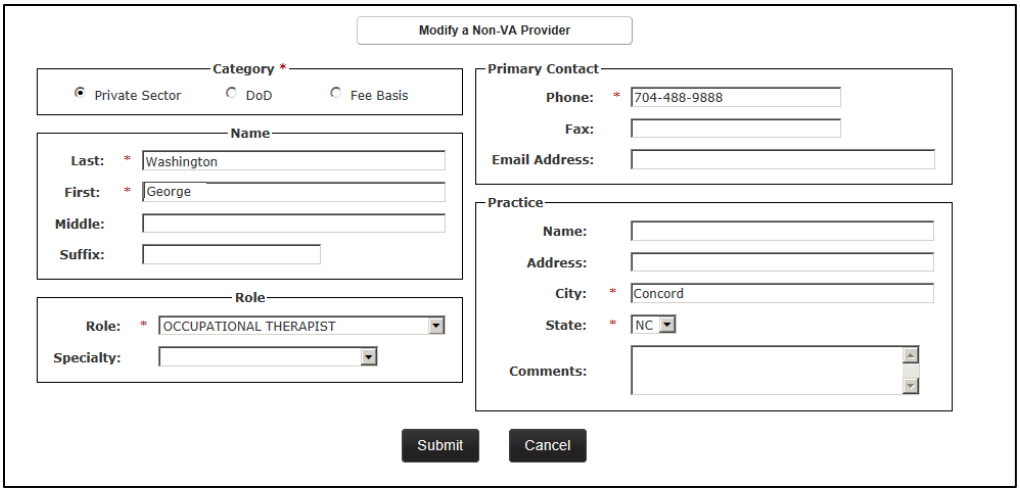
Update an Existing non-VA Provider

Users can edit non-VA provider records already listed in PCMM.

1. Locate the non-VA Provider's information using the *Search for Non-VA Provider* screen (*see the* Search for non-VA Provider *section*). Click the corresponding link for the name listed in the **Provider Name** column.



2. The *Modify a Non-VA Provider* screen will display. You can change any or all of the fields shown.
3. Click **Submit** to continue, **Cancel** to cancel.



4. The *Non-VA Provider Information* screen displays, with the changes saved in the record. There will also be a confirmation message displayed at the top of the screen.
5. If the Non-VA Provider has an email, you can click the e-mail envelope icon. This will start your e-mail client with the contact's email address in the *To:* field.
6. You can click on the name to return to the *Modify a Non-VA Provider* screen

See also:

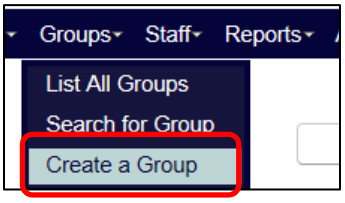
Search for VA Staff
Assign Staff to a Position
Reassign/Change Staff Assignment
Remove Staff from a Position
Search for Non-VA Provider
Create a Non-VA Provider

GROUP MANAGEMENT

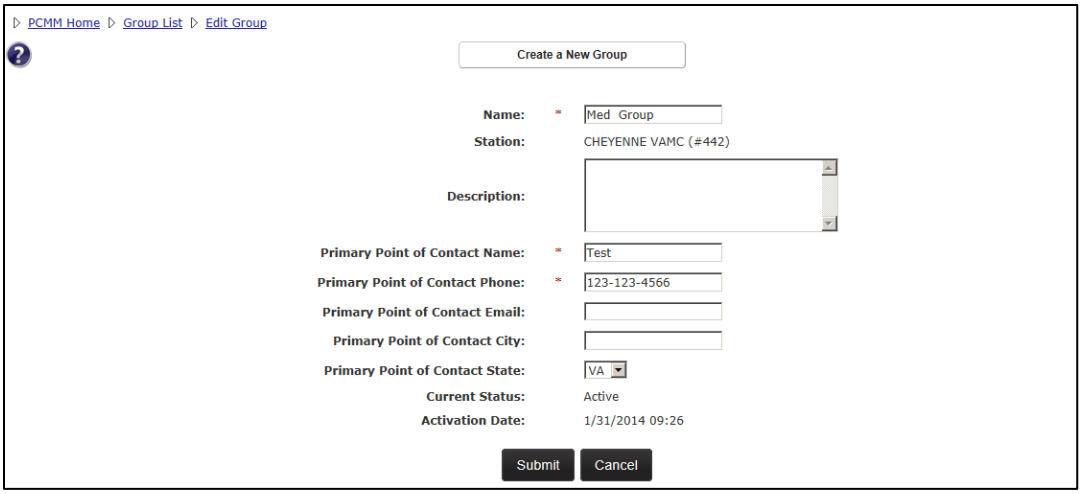
Create a New Group

You are able to create a new group and add the group information to the PCMM system. This adds the group name to the *Group List* screen and allows you to search for the group information.

1. From the **Groups** drop-down menu, select **Create a Group** to display the *Create a New Group* screen. **Note:** You also can display this screen by clicking the Create a Group button on the *List Groups* screen (**Groups > List All Groups > List Groups**).



2. Enter a name for the group. The system will ensure that the new name is unique across all stations with the same three-digit code as the currently logged-in station. The system will display an error message if a duplicate group name is found. If so, please enter a new unique group name.
3. You may enter a description of the group.
4. Enter a **Primary Point of Contact** name.
5. Enter a **Primary Point of Contact** phone number.
6. You may enter a **Primary Point of Contact** city and state.
7. Click **Submit** to save the group information and display the *Groups List* screen. The new group will be listed with a current status of **Active**. You can also click **Cancel** to return to the *Groups List* screen without saving any data.
    - The system will display an error message for any required field that is not completed. You must complete the fields before re-submitting the group information.
    - The system will validate the values of the required fields for *Name* and *Primary Point of Contact Email* to ensure proper entry.
    - A *Current Status* field will automatically populate with an **Active** status once a group is created and will be displayed on the “Modify an Existing Group” screen. You can also inactivate a group.

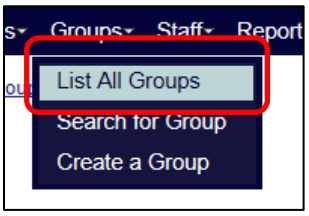


See also:
View Groups List
Search for a Group
Modify an Existing Group
Inactivate a Group
Assign and Un-assign a Team from a Group

View Groups List

You are able to view a station-level summary list of all active groups. This allows you to view or modify group information, email a group's primary point of contact, view information about a group's teams, and inactivate a group.

1. From the **Groups** drop-down menu, select **List All Groups** to display the *Groups List* screen.



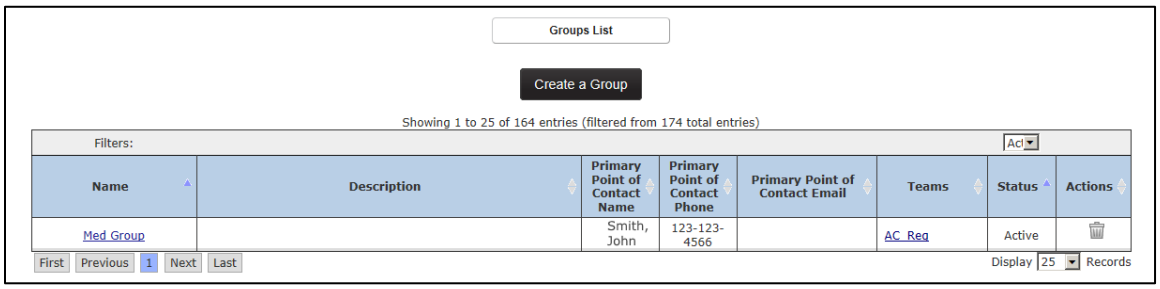
2. For each group listed for that station, the list will display:
   - Name
     - You can view or modify group information by clicking a name link in the **Name** column. This will display the *Modify an Existing Group* screen (See the *Modify an Existing Group* section for more information).
   - Description
   - Primary Point of Contact Name
   - Primary Point of Contact Phone
   - Primary Point of Contact E-mail
     - You can e-mail a group's primary point of contact by clicking the envelope icon in the **Primary Point of Contact** E-mail column. This

will start your e-mail client with the contact's email address in the **To:** field.

- Teams
  - You can view information about teams assigned to a group by clicking a team name link in the **Teams** column. This will display the *Modify an Existing Team* screen (See the *Modify an Existing Gro––––up* section for more information).
- Status (Active or Inactive)
- Actions
  - Inactivate a group by clicking the icon in the **Actions** column. Note that once a group is inactivated, all teams assigned to the group are unassigned from the group and the group cannot be reactivated. See the *Inactivate a Group* section for more information

3. The list can be sorted by any column or narrowed by using a filter for **Current Status**. Active teams are listed first, followed by inactive teams.

Note: the list of groups can be narrowed by using a filter for **Current Status**. Active teams are listed first, followed by inactive teams.

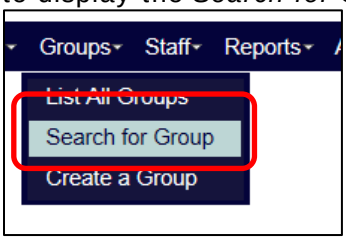


See also:
[Modify an Existing Group]
[Assign and Unassign a Team from a Group]
[Create a New Group]
[Inactivate a Group]
[Search for a Group]

Search for a Group

You can search for a group to view or modify its information.

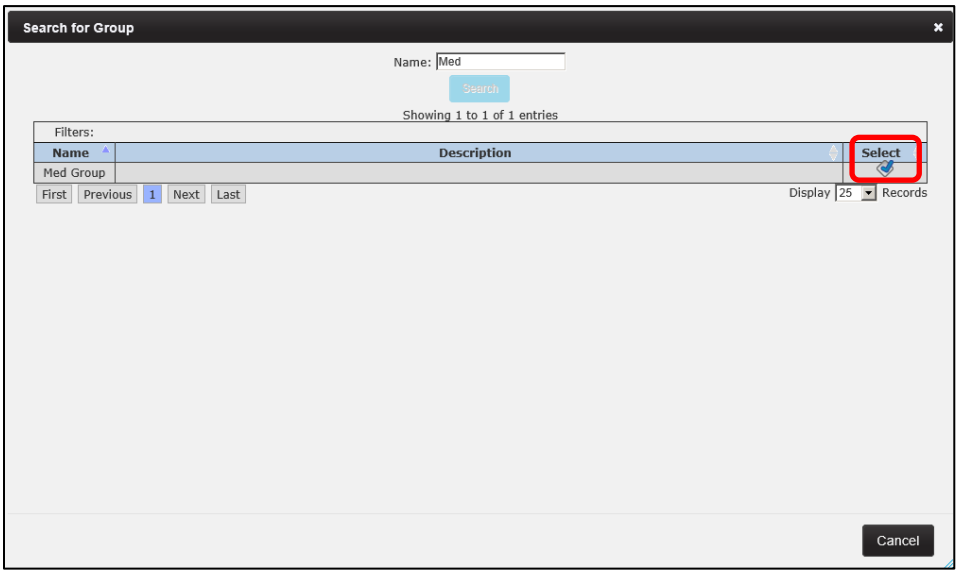
1. Select **Search for Group** on the *Groups* drop-down menu on the PCMM home page to display the *Search for Group* dialog box.



2. Enter all or part of the group name desired in the **Name** field and click **Search** to display a list of groups with that search criteria. Alternatively, you can also leave the

Name field blank and click the **Search** button to display a list of all groups for that station.

3. The *Search for Group* dialog box will display. The following columns are displayed in the group list table:
    - Name
    - Description
    - Select
4. Click an icon (blue check) in the **Select** column for the desired group to display the *Modify an Existing Group* screen. *See the* Modify an Existing Group *section for more information.*



See also:

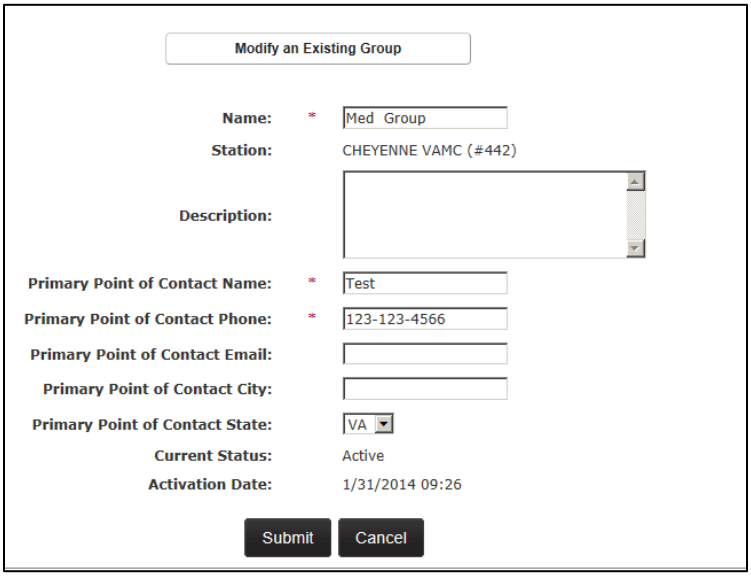
Modify an Existing Group
Assign and Un-assign a Team from a Group
Inactivate a Group
View Groups List
Create a New Group

Modify an Existing Group

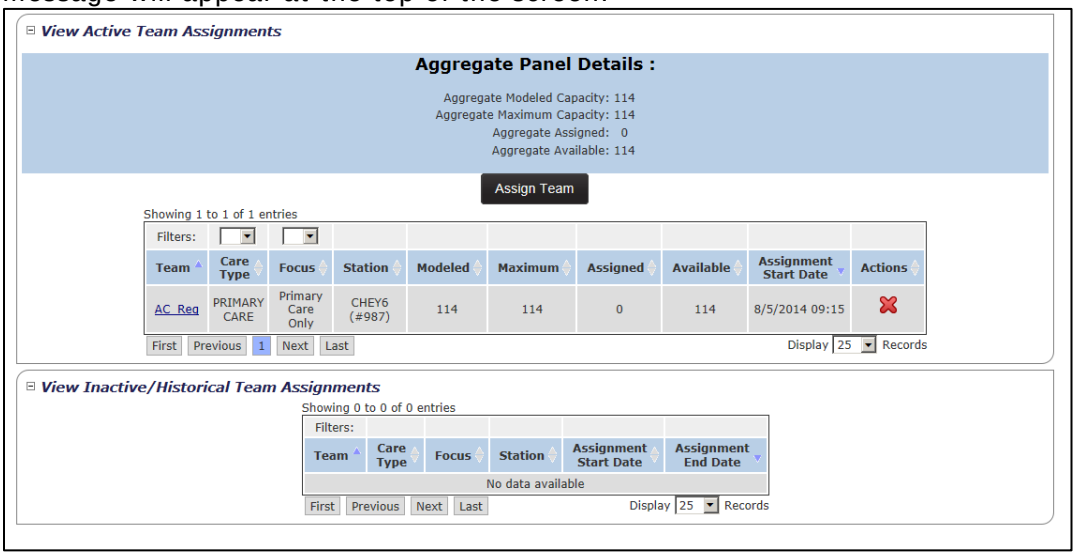
You can view or modify information for a group in the *Modify an Existing Group* screen.

1. From the *Modify An Existing Group* screen for the group (*see the* Modify An Existing Group *section*), the following information will be displayed:
    - Name
    - Station
    - Description
    - Primary Point of Contact Name
    - Primary Point of Contact Phone
    - Primary Point of Contact E-mail
    - Primary Point of Contact City
    - Primary Point of Contact State
    - Current Status (Active or Inactive)Activation Date

2. You can edit the **Name, Description**, and all **Primary Point of Contact** information.



3. You can also:
   - Click the **View Active Team Assignments** toggle link at the bottom of the screen to view a list of team and room assignments.
   - Make new team assignments to the group by clicking **the View Active Team Assignments** toggle link, and then clicking the **Assign Team** button.
   - Click the **View Inactive/Historical Team Assignments** toggle link at the bottom of the screen to view a list of historical data.
4. Click **Submit** to save any changes and display the *Groups List* screen. A confirmation message will appear at the top of the screen.



See also:

Search for a Group
Assign and Unassign a Team from a Group
Inactivate a Group

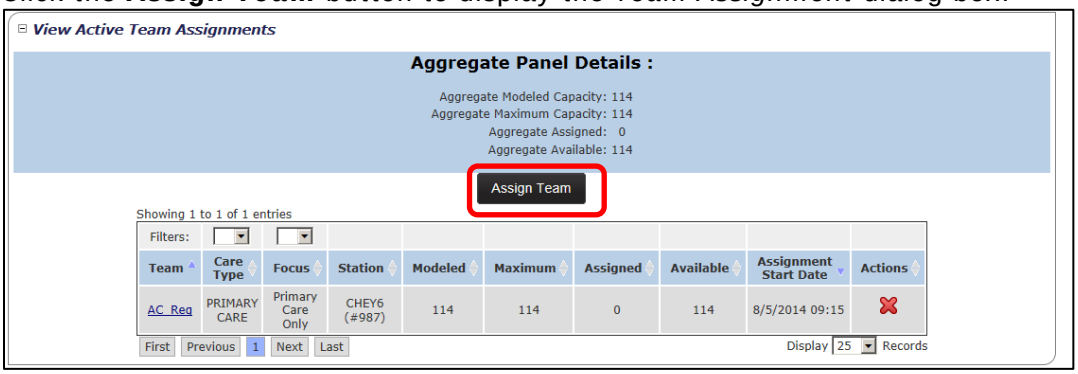
View Groups List
Create a New Group

Assign and Un-assign a Team from a Group

You can assign or un-assign a team to or from a group in the *Modify an Existing Group* screen.

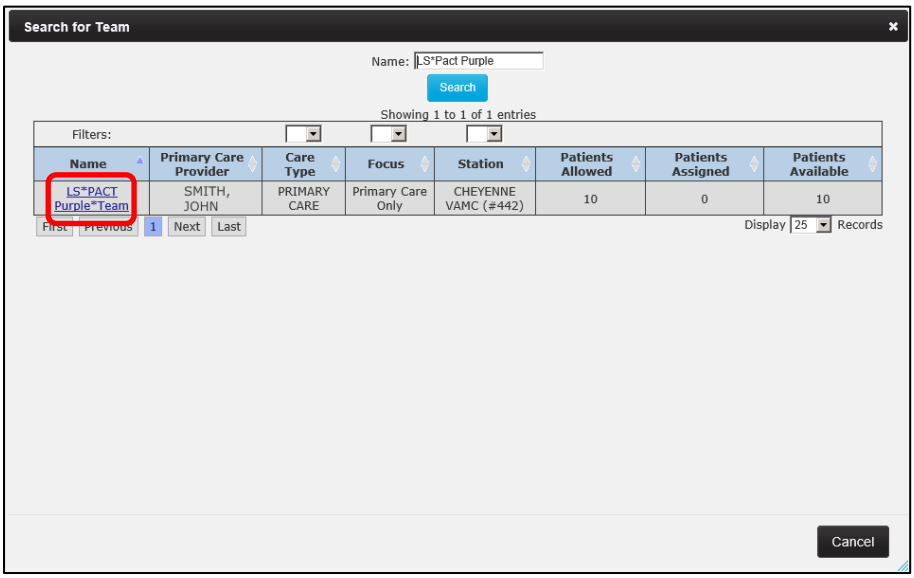
To Assign a Team:

1. From the *Modify an Existing Group* screen for the group (*See the* Modify An Existing Group *section*), click the **View Active Team Assignments** toggle link at the bottom of the screen to view a list of team and room assignments. The following information will display:
    - Aggregate Panel Details (total for the whole group)
        - Aggregate Modeled Capacity
        - Aggregate Maximum Capacity
        - Aggregate Assigned
        - Aggregate Available
    - Team
    - Care Type
    - Focus
    - Station
    - Modeled (Team Capacity)
    - Maximum (number of patients assigned)
    - Assigned (patients assigned to the team)
    - Available (number of patients available to be assigned to the team)
    - Assignment Start Date
    - Actions (You can use this column to unlink the team from the group assignment. See the next section for more information.)
    - The list can be sorted by any column or narrowed by applying filter values for Care Type and Focus.
2. Click the **Assign Team** button to display the *Team Assignment* dialog box.

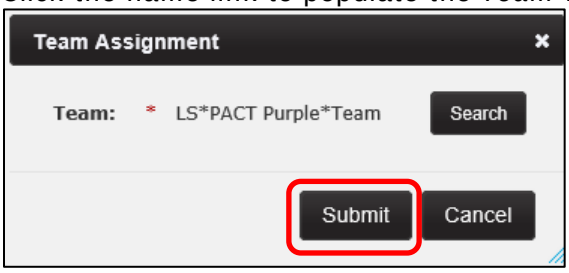


3. Click the **Search** button to display the *Search for Team* dialog box.

4. Enter all or part of a team name and click **Search** to display a list of team names. Alternatively, you can also leave the field empty and click **Search** to display a list of all available team names.



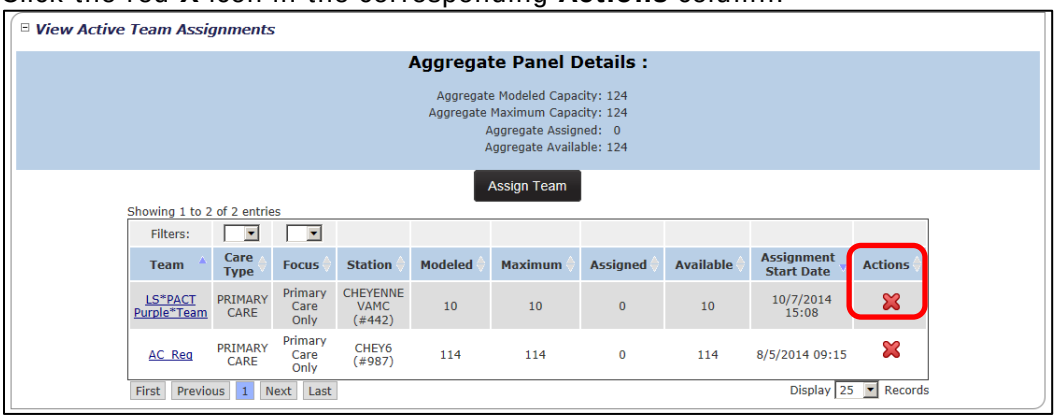
5. Click the name link to populate the *Team* field in the *Team Assignment* dialog box.



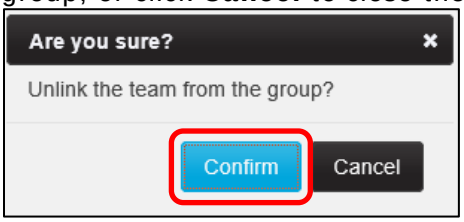
6. Click **Submit** to continue, **Cancel** to cancel. A confirmation message will display at the top of the screen.

To Un-assign a Team:

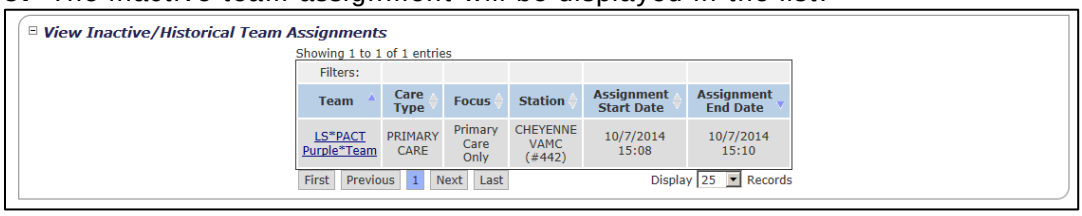
1. Click the **View Active Team Assignments** toggle link.
2. Click the red **X** icon in the corresponding **Actions** column.



3. The *Are You Sure?* dialog box will display. Click **Confirm** to unlink the team from the group, or click **Cancel** to close the dialog box without making changes.



4. Click the **View Inactive/Historical Team Assignments** toggle link. The following information will be displayed:
   - Team
   - Care Type
   - Focus
   - Station
   - Assignment Start Date
   - Assignment End Date
   - The list can be sorted by any column.
5. The inactive team assignment will be displayed in the list.



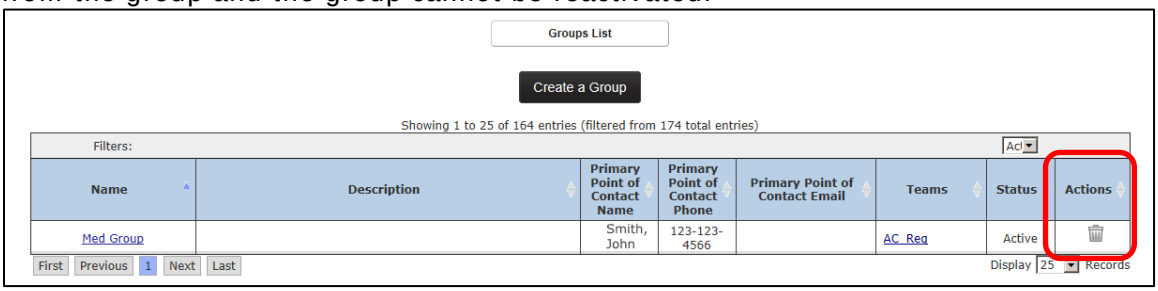
See also:

Modify an Existing Group
Inactivate a Group
Search for a Group
Create a New Group
Modify an Existing Group

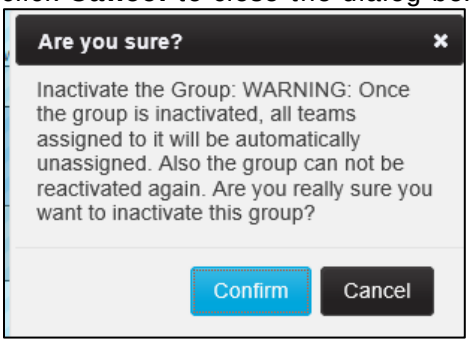
Inactivate a Group

You can inactivate a group in the *List Groups* screen.

1. From the *Groups List* screen, click the icon (trash can) in the **Actions** column. Note that once a group is inactivated, all teams assigned to the group are unassigned from the group and the group cannot be reactivated.



2. The *Are You Sure?* dialog box will display. Click **Confirm** to inactivate the group, or click **Cancel** to close the dialog box without making changes.



3. The *View an Existing Group* screen will display, with a confirmation message and the Status listed as *Inactive*. All values will be defaulted to zero in the *View Team Assignments* section.
4. Click the **View Inactive/Historical Team Assignments** toggle link. The following information will be displayed:
    - Team
    - Care Type
    - Focus
    - Station
    - Assignment Start Date
    - Assignment End Date
    - The list can be sorted by any column.

See also:

View Groups List
Assign and Un-assign a Team from a Group
Modify an Existing Group
Search for a Group
Create a New Group

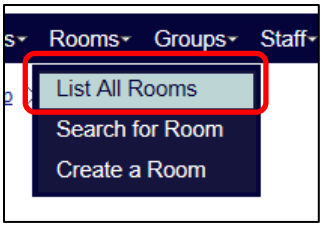
ROOMS MANAGEMENT

Manage Rooms

PCMM Coordinators are able to manage rooms using the *List All Rooms* screen.

To Manage Rooms:

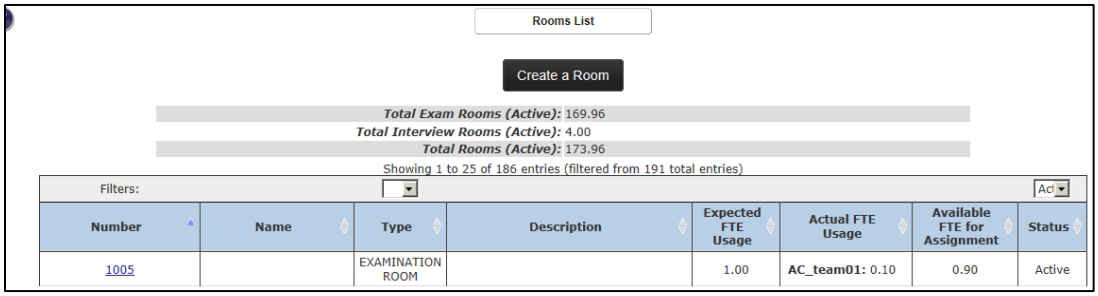
1. Select **List All Rooms** from the **Rooms** drop-down menu to display the *Rooms List* screen.



2. For each room, the list will display the:
   - Total Exam Rooms (Active)
   - Total Interview Rooms (Active)
   - Total Rooms (Active)
   - Room Number
   - Room Name
   - Room Type (examination, interview, or both)
   - Room Description
   - Expected FTE Usage (0.01 – 1.00)
   - Actual FTE Usage
   - Available FTE for Assignment (determined by system)
   - Room Status (Active/Inactive)

The room list will initially be displayed in order by *Number* and will include all rooms. The list can be sorted by any column or narrowed by applying filter values for Type and Status. You can perform the following tasks on this screen, depending on your user role:

- You can create a room by clicking the **Create a Room** button.
- You can modify a selected room by clicking the **Room Name**.



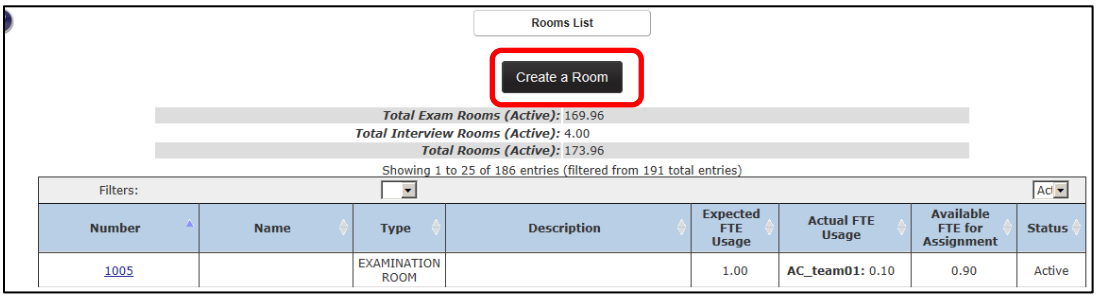
See Also:

- Create a Room
- Search for a Room
- Modify an Existing Room
- Assign a Room to a Team
- View Room Assignments for a Team

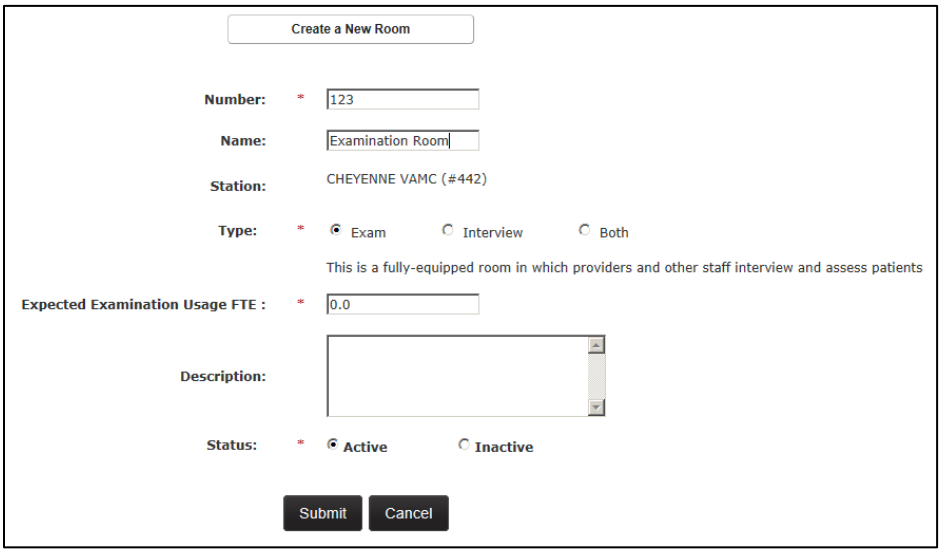
Create a Room

To Create a Room:

1. Select **Create a Room** from the **Rooms** drop-down menu to display the *Create a New Room* screen.
    - **Note:** you can also reach the *Create a New Room* screen by following this path: **Rooms** drop-down menu > **List All Rooms** > *List All Rooms* screen > **Create a Room** button.



2. You must enter a unique room number in the **Number** field. This is an alphanumeric field.
3. Enter a room name in the **Name** field.
4. Select a room type. (*Exam* is selected by default). For each selection, a description of the room type is displayed.
5. Enter an expected **FTE** value. It must be greater than 0.00 and it cannot be greater than 1.00.
6. You can enter a room description.
7. Accept the default room status of **Active**, or select **Inactive**. You can edit the room information later.
8. Click **Submit** to save the data and display the *Rooms List* page. The new room will be listed.

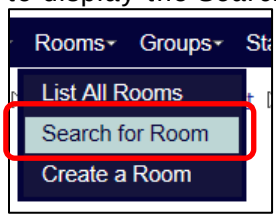


See also:

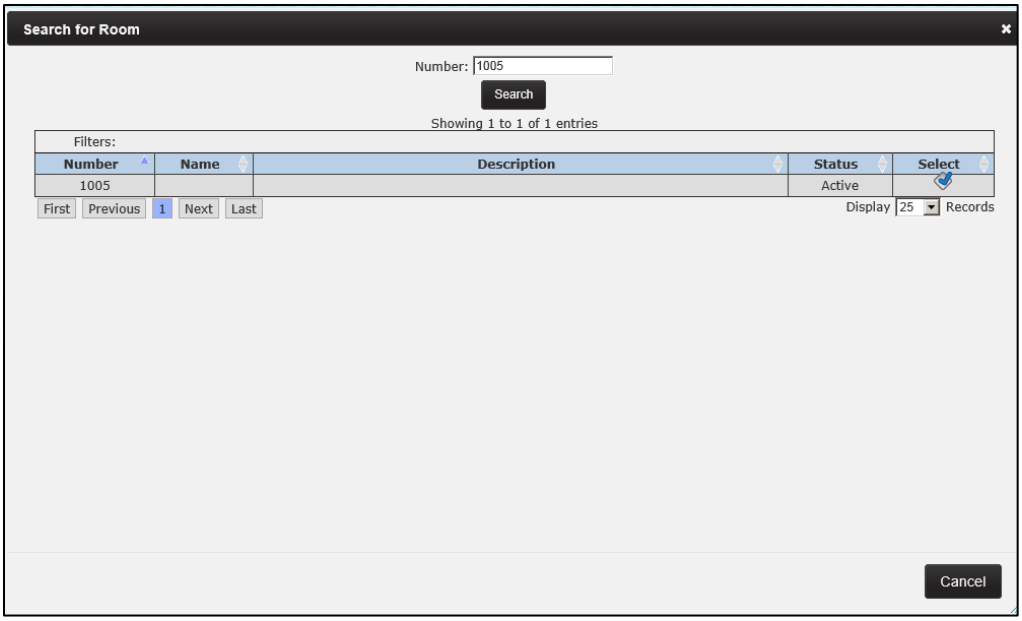
Modify an Existing Room
Search for a Room
Manage Rooms
Assign a Room to a Team
View Room Assignments for a Team

Search for a Room

1. Select **Search for Room** on the **Rooms** drop-down menu on the PCMM home page to display the *Search for Room* dialog box.



2. Enter all or part of the room desired in the *Number* field and click **Search** to display a list of rooms below the **Search** button. Alternatively, you can also leave the Number field blank and click the **Search** button to display a list of all rooms for that station.
3. The Search for a Room dialog box will display. The following columns are displayed in the room list table:
   - Number
   - Name
   - Description
   - Status
   - Select
4. Click the icon in the **Select** column for the desired room to display room information in the *Modify An Existing Room* screen. Alternatively, you can click **Cancel** to cancel out of the search.



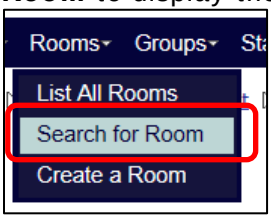
See also:

[Modify an Existing Room]
[Create a Room]
[Manage Rooms]
[Assign a Room to a Team]
[View Room Assignments for a Team]

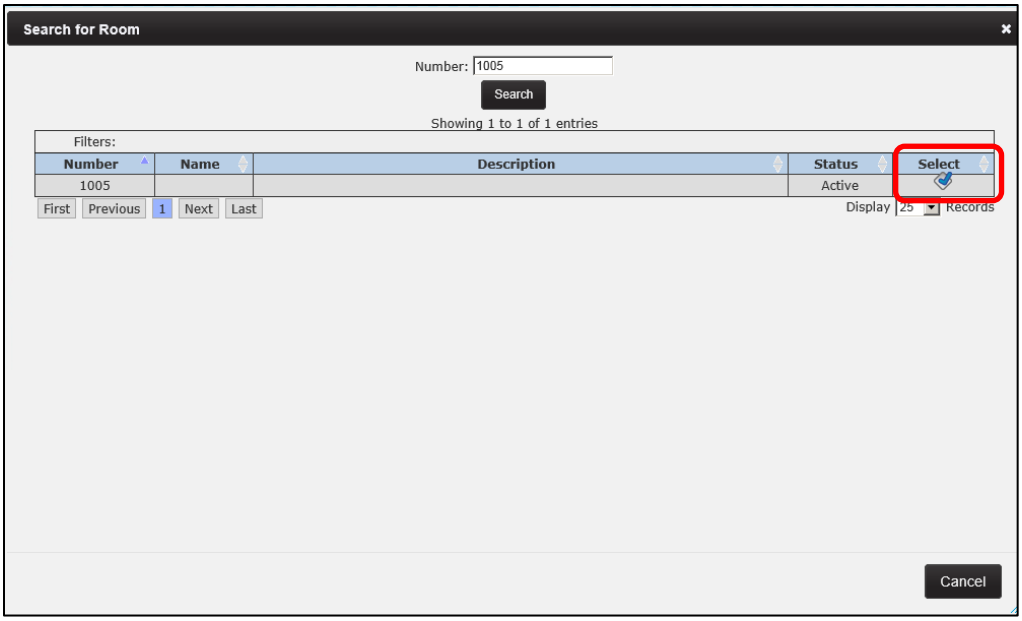
Modify an Existing Room

To Modify an Existing Room:

1. From the **Rooms** drop-down menu on the PCMM home page, select **Search for Room** to display the *Search for Room* dialog box.



2. Enter all or part of the room desired in the **Number** field and click **Search** to display a list of rooms. Alternatively, you can also leave the Number field blank and click the **Search** button to display a list of *all* rooms for that station.
3. Click the icon in the **Select** column that corresponds to the desired room. The room information will display in the *Modify an Existing Room* screen.

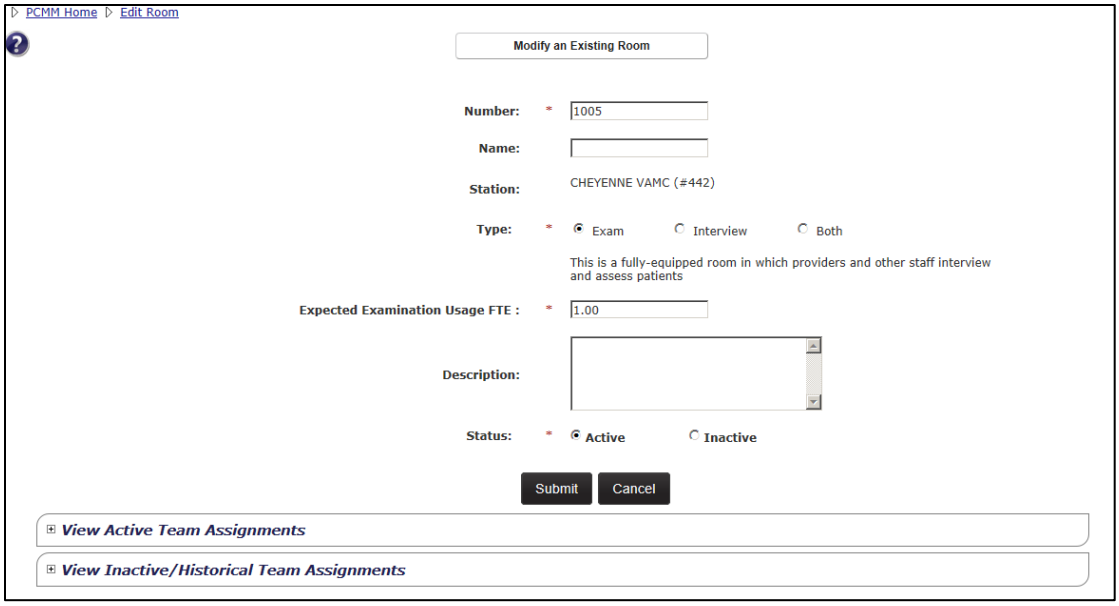


4. You can change the following information for that room:

    - Number
    - Name
    - Type
    - Expected Examination Usage FTE
    - Description
    - Status *(Active/Inactive)*
    - *Every field value except for Room Name and Description is required and must contain a value.*

5. Click **Submit** to save the information and display the *Room List* screen.

From this screen you can also view the Active Team Assignments and the Inactive/Historical Team Assignments for the room. See the *View Room Assignments for a Team* section for more information.

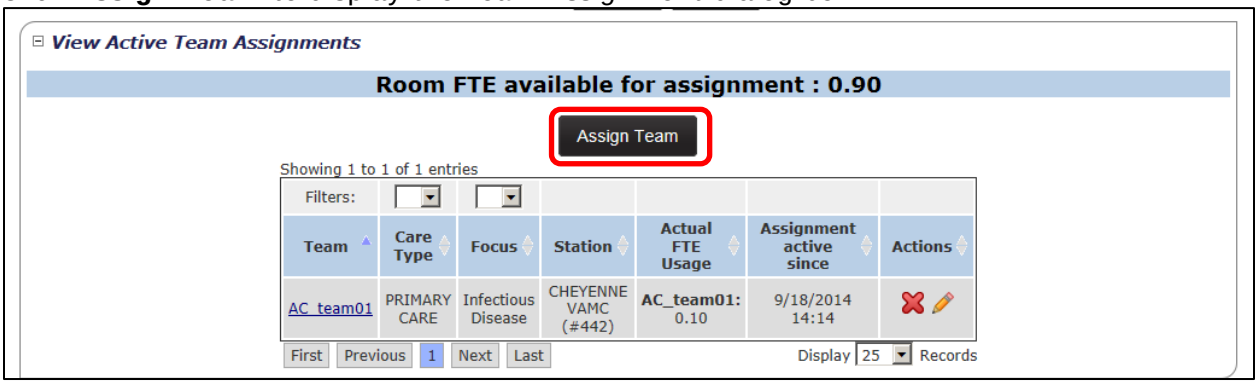


See also:

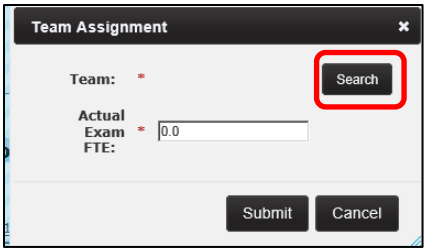
Search for a Room
Create a Room
Manage Rooms
Assign a Room to a Team
View Room Assignments for a Team

Assign a Room to a Team

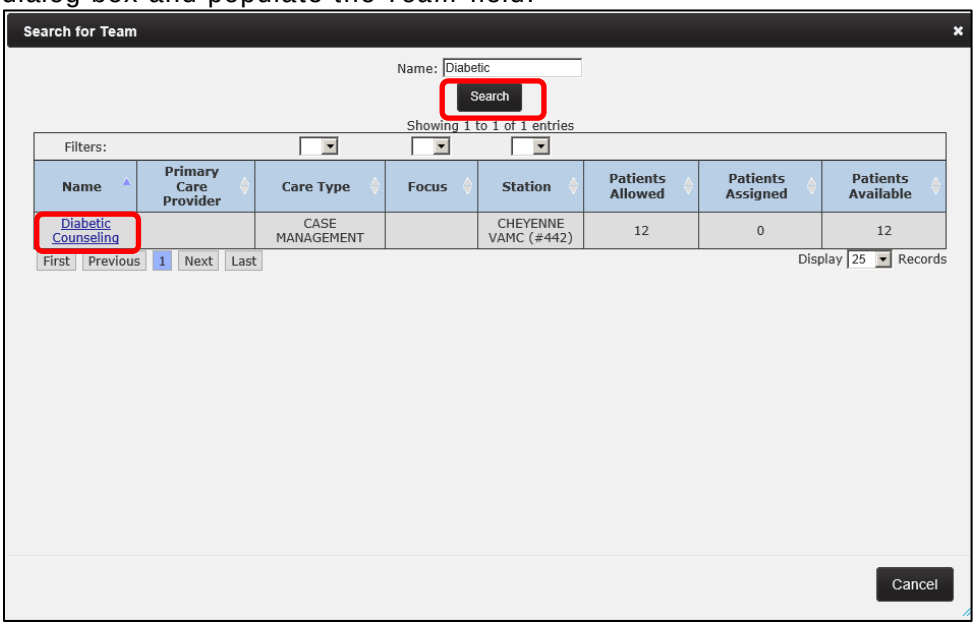
1. From the Modify An Existing Room screen (See the Modify An Existing Room section), click the View Active Team Assignments toggle link to view a list of team and room assignments.
2. Click **Assign Team** to display the *Team Assignment* dialog box.



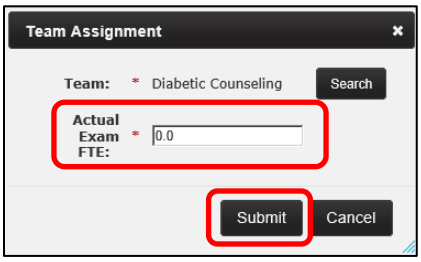
3. Click **Search** to display the *Search for Team* dialog box.



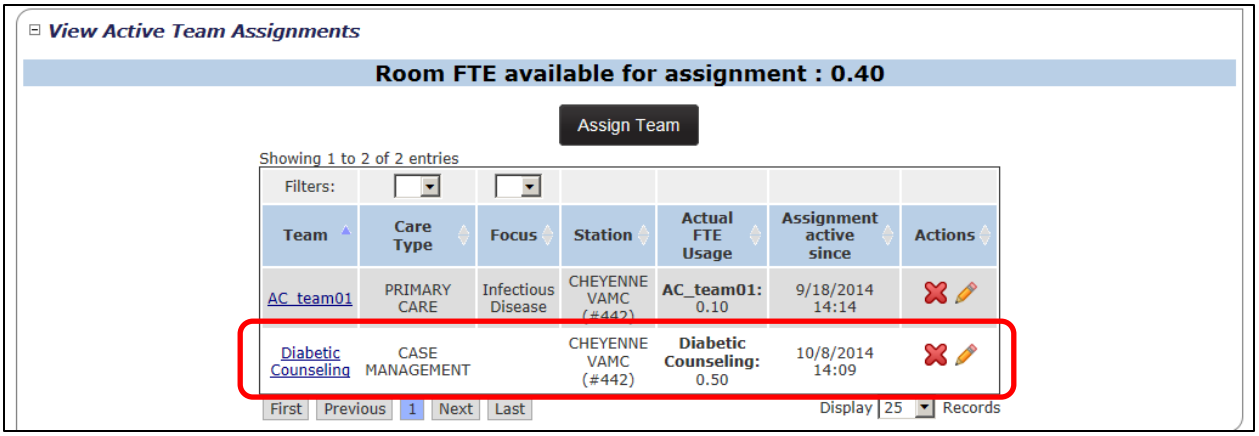
4. Enter all or part of the team name desired in the **Name** field and click **Search** to display a list of teams. Alternatively, you can also leave the *Name* field blank and click the **Search** button to display a list of all teams.
5. Select the **Team Name** link in the Name column to return to the Team Assignment dialog box and populate the *Team* field.



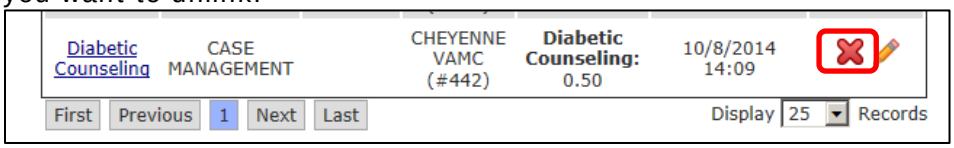
6. Enter an **Actual FTE** value for the exam, Interview, or both rooms. The FTE value must be greater than 0.00 and it cannot be greater than 1.00. If the FTE value entered for the team assignment is greater than the FTE value assigned to the room, an error message will display.
7. Click **Submit** to save the information and display the *Modify an Existing Room* screen.



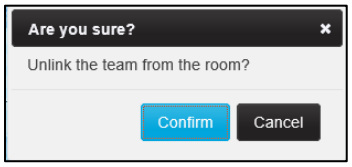
8. Click the **View Active Team Assignments** toggle link to view a list of teams and room assignments. The new team and room assignment is listed.



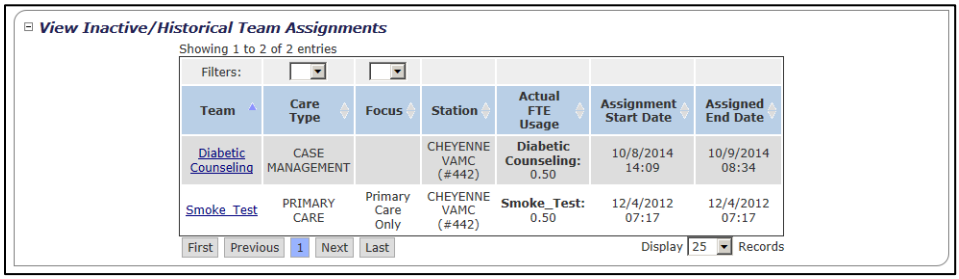
9. You can Unlink a team from the room assignment, or change the actual FTE value for a team's use of the room:
   - To Unlink the team from the room assignment:
     1. Click the **X** icon in the *Actions* column that corresponds to the team you want to unlink.



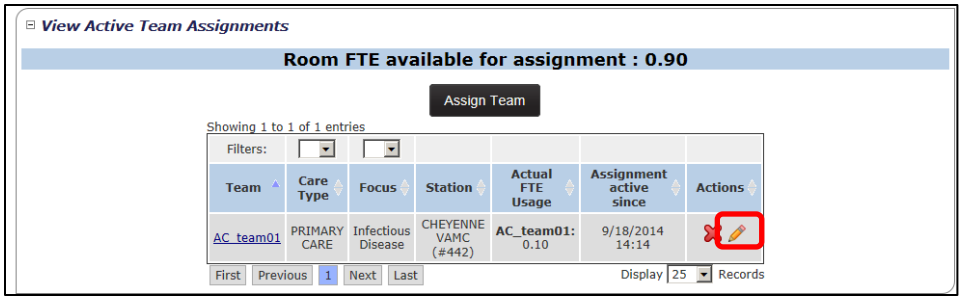
     2. An *Are you sure* dialog box will display. Click **Confirm** to continue; **Cancel** to cancel.



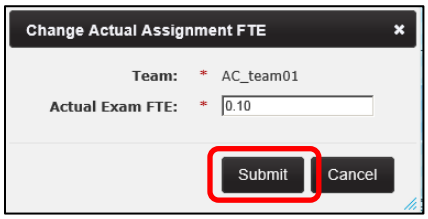
     3. Click the **View Inactive/Historical Team Assignments** toggle link to view the team's assignment record.



   - To change the Actual FTEE value for a team's use of the room:
     1. Click the **pencil icon** in the *Actions* column that corresponds to the team's FTE you want to change.



2. The *Change Actual Assignment FTE* dialog box will display. Enter an **Actual FTE** for the team.



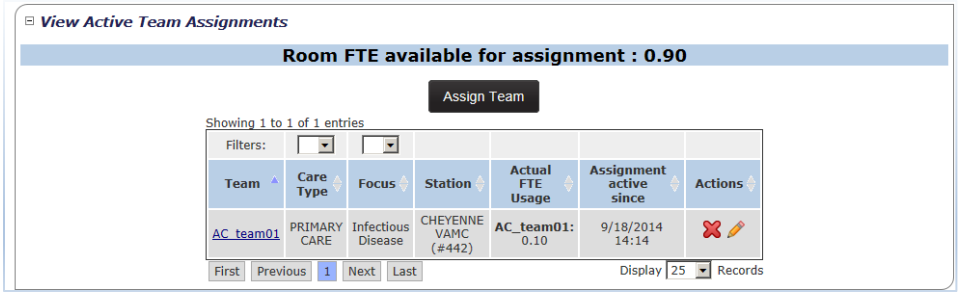
3. Click **Submit** to continue, **Cancel** to cancel.
4. If the FTE value entered for the team assignment is greater than the FTE value assigned to the room, an error message will display. Click **Close** and enter a valid FTE value.
5. Click **Submit** to save the record.

See also:

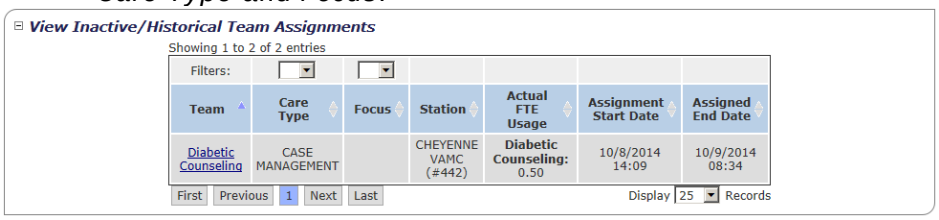
Search for a Room
Create a Room
Modify an Existing Room
Manage Rooms
View Room Assignments for a Team

View Room Assignments for a Team

1. From the *Modify an Existing Room* screen (See the *Modify An Existing Room* section), click the **View Active Team Assignments** toggle link to view a list of team and room assignments. The following information will display:
   - Team
   - Care Type
   - Focus
   - Station
   - Actual FTE Usage
   - Assignment active since
   - Actions (You can use this column to either unlink the team from the room assignment or change the Actual FTEE value for a team's use of the room. See the Assign a Room to a Team section for more information.)
   - The list can be sorted by any column or narrowed by applying filter values for Care Type and Focus.



2. Click the **View Inactive/Historical Team Assignments** toggle link to view a list of past team and room assignments. The following information will display:
   - Team
   - Care Type
   - Focus
   - Station
   - Actual FTE Usage
   - Assignment Start Date
   - Assigned End Date
   - The list can be sorted by any column or narrowed by applying filter values for *Care Type* and *Focus*.



See also:

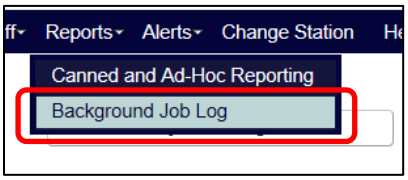
Search for a Room
Create a Room
Modify an Existing Room
Manage Rooms
Assign a Room to a Team

REPORTS

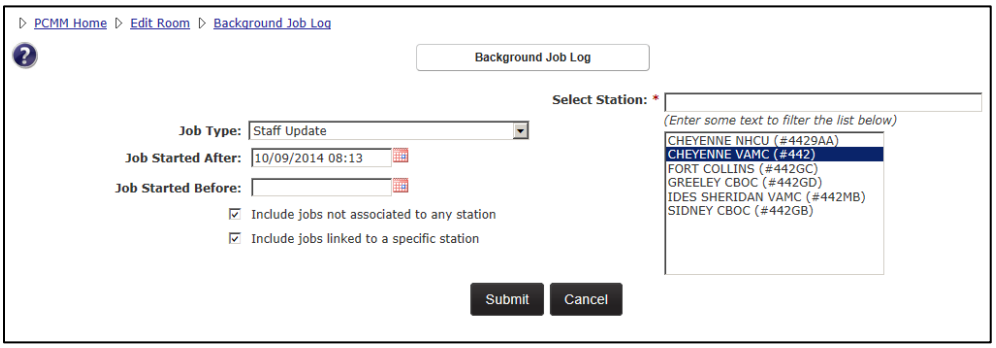
Background Job Log

You can search and view background job logs from this screen.

1. From the main menu, click **Reports** > **Background Job Log**. The job list will display all records associated with the station you logged into when you signed in to PCMM.



2. Use the selection criteria to choose another query. Select:
   - **Job Type**, if desired (*Any* is the default, but you can filter by *CPRS Header Sync, CPRS Header Sync Monitor, Patient Auto-Inactivation, Patient Bulk Transfer, Staff Update* or *VistA Sync*)
   - **Job Started After** (*Current day and time* is the default)
   - **Job Started Before**, if desired
   - **Include jobs not associated to any station** and **Include jobs linked to a specific station** are checked by default. Uncheck if desired
   - **Station.**



3. Click **Submit** to continue, **Cancel** to cancel.
4. The system will display a table with the following columns:
   - **Station**
   - **Type**
   - **Start Time**
   - **End Time**
   - **Initiator**
   - **Details**
   - You can filter the results by **Station, Type** and **Initiator**.

Showing 1 to 8 of 8 entries

Station	Type	Start Time	End Time	Initiator	Details
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 09:10		System	
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 08:50	10/9/2014 09:05	System	
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 08:30	10/9/2014 08:45	System	
CHEYENNE VAMC (#442)	Vista Sync	10/9/2014 08:25	10/9/2014 08:26	System	
	CPRS Header Sync	10/9/2014 08:25	10/9/2014 08:25	System	
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 08:25	10/9/2014 08:25	System	
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 08:20	10/9/2014 08:20	System	
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 08:15	10/9/2014 08:15	System	

First Previous 1 Next Last Display 25 Records

5. To see the details of a job, click the **View Job Results Details** icon in the Details column that corresponds to the job you want to view.

Station	Type	Start Time	End Time	Initiator	Details
CHEYENNE VAMC (#442)	Patient Auto-Inactivation	10/9/2014 09:10		System	

6. The Result of Batch Job Execution screen will display with the following columns:
   - Patient
   - Position
   - Team Status
   - Result Details
   - Completion Time

Depending on the type of job you selected, the appropriate details will display in the table.

- The CPRS Header Sync job type will display the Patient name that links to Patient Profile screen.
- The Patient Bulk Transfer job type will display the requestor's name and email link. Uncheck the Include jobs linked to a specific station check box and select a station before proceeding.

Result of Batch Job Execution

Batch Job initiated on the request of: System

Showing 1 to 6 of 6 entries

Filters:

Patient	Position	Team	Status	Result Details	Completion Time
			Failed	Processing encounter dates	
			Failed	Processing encounter dates	
			Failed	Processing encounter dates	
			Failed	Failed to process encounter dates at station 442 at sun.reflect.DelegatingMethodAccessorImpl.invoke(DelegatingMethodAccessorImpl.java: at java.lang.reflect.Method.invoke(Method.java:606) at org.springframework.aop.aspectj.AbstractAspectJAdvice.invokeAdviceMethodWithGiven at org.springframework.aop.aspectj.AbstractAspectJAdvice.invokeAdviceMethod(AbstractA at org.springframework.aop.aspectj.AspectJAroundAdvice.invoke(AspectJAroundAdvice.jav at org.springframework.aop.framework.ReflectiveMethodInvocation.proceed(ReflectiveMet at org.springframework.transaction.interceptor.TransactionInterceptor$1.proceedWithInvo	10/9/2014 09:15
			Failed	Failed to process encounter dates at station 442 at gov.va.med.pcmm.service.scheduledJobs.PatientAutoInactivationJobAsyncHelper.proce at gov.va.med.pcmm.service.scheduledJobs.PatientAutoInactivationJobAsyncHelper.perfor at gov.va.med.pcmm.service.scheduledJobs.PatientAutoInactivationJobAsyncHelper$$Fast at org.springframework.cglib.proxy.MethodProxy.invoke(MethodProxy.java:204) at org.springframework.aop.framework.CglibAopProxy$CglibMethodInvocation.invokeJoinp at org.springframework.aop.framework.ReflectiveMethodInvocation.proceed(ReflectiveMet at org.springframework.aop.aspectj.MethodInvocationProceedingJoinPoint.proceed(Methoc at gov.va.med.pcmm.util.MethodTimerAspect.logTimeMethod(MethodTimerAspect.java:25	10/9/2014 09:20
			Success	Querying VistA for all encounters after 10/9/2014 14:05 UTC; encounters found for 4 patients.	10/9/2014 09:10

First Previous 1 Next Last Display 25 Records

See also:

Result of Batch Job Execution

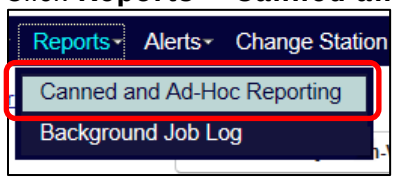
Canned and Ad Hoc Reporting

Active Panel Report

This report depicts the Capacity and FTEE for each team and optionally each staffed position on each team. Note: PCMM uses SQL Server Reporting Services to run the Active Panel Report. This enables reports to return results faster than having PCMM run reports through its own web application.

If you have permission, you can run reports. If not, they will be read-only.

1. Click **Reports** > **Canned and Ad-Hoc Reporting**.



2. Select from the following SSRS parameters:
   - **Date** (required): Default to current date/time, or enter in text box or choose from calendar control). If applicable, the information for the report will display everything on record through the specified date and time.
   - **Report level:** (required): Default to station, but can choose form National, VISN, or station. If station, can choose Position Detail.
   - **Care Type** (required): Default is All
   - **Focus**

3. The following fields will be displayed:
   - **Station**
   - **Team**
     - **Care Type/Focus**
     - **Name**
       - **Position(s)** (Note: Only display this field when "Include Position Detail" checkbox is selected
     - **Team Status** (Indicator for Team)
   - **Capacity**
     - **Allowed** (Total Number of Patients Allowed for each active position on the team)
     - **Assigned** (Total Number of Patients with current active assignment to the team)
     - **Available** (Patient allowed minus patient assigned)
     - **Utilization** (Patient assigned divided by patient allowed times 100 = percentage)
   - **FTEE**
     - **Expected** (Total expected FTEE for each active position on the team)
     - **Actual** (Total actual FTEE captured for each active staff assignment to each active position on a team)

    - **Utilization** (Actual FTEE divided by expected FTEE divided by 100 = percentage)
- **Potentially Deceased**

Include Position Detail

- If the **Include Position Detail** box is checked, all active positions with active staff assignments will be displayed.
- This option provides the capacity and FTEE for all the active positions with the active staff assignments for each team included in the report and will be listed under the Team Name. (Ex. Staff Name - Position Assignment)
- The data for the assigned capacity and FTEE associated with each position can be retrieved from the following screens:
    - Position Profile (Allowed Patients, Assigned Patients, Available Patients, Expected FTEE)
    - Show Staff (Actual FTEE)

- The *Position Detail* will be listed in the following order:
    - PCP, if applicable (If there is an active preceptor on team; search for Preceptor but display as PCP)
    - AP(s), if applicable (If there are any active preceptees for team; search for *Preceptee* but display as AP
    - If Preceptor/Preceptees are listed; then a *Subtotal* row will be provided for the assignments of PCP/AP for capacity and FTEE.
    - Care Manager
    - Clinical Associate (Clinical Assc)
    - Administrative Associate (Admin Assc)
    - Any additional active positions with staff assignments will be listed.

ADMINISTRATION

Performing Administrative Tasks

Administrators have the ability to manage various tasks. They can do the following:

- Manage the permissions settings that drive the activities a particular provider can perform.
- Assign administrative and functional stations to a system user within their own station.
- Manage the users under their own area or those of areas under their responsibility.

There are also various levels of system administrators:

- Local
- Regional
- National

Local Administrators can assign stations to a system user within their own station.

Regional and National Administrators have a larger pool of stations available to them for assignment of users. This is helpful when a system user is an Occupational Health (OH) provider at multiple facilities.

See also:

Manage Reference Data
Modify Reference Data

Manage Reference Data

A PCMM National Administrator is able to view and manage the data on the dropdown lists within the PCMM application, so that the selection list of values will not require modification by developers and will available immediately.

To Manage Reference Data:
From the Administration drop-down menu, select Manage Reference Data to view the Manage Reference Data screen.

1. Select either **Care Type** or **Focus** from the *Reference* drop-down list and click **View** to display a list of data. (See *Modify Reference Data* section for information on the **Non-VA Provider** role).
2. Click a link in the **Name** column to display the *Modify Reference Data* screen.
3. You can enter/change the following information:
    - **Name**
    - **Description**
    - **Sort Order**
    - **Justification**
    - Check the box to inactivate the data record, if desired. An **Inactivate Reason** will be required to save the record. If the record is an existing record, the Code cannot be changed

4. Click **Submit/Confirm** to save, **Cancel/Confirm** to exit without saving changes and return to the *Manage Reference Data* screen.
5. You also have the option of selecting another reference type to display. Select another choice from the **Reference: Type** drop down list and click **View**. The *Modify Reference Data* screen will display the **Care Type** and **Focus** data, while the *Manage Reference Data* screen will display for the **Non-VA Provider Role** choice.

See also:

Modify Reference Data
Performing Administrative Tasks

Modify Reference Data

A PCMM National Administrator is able to modify items on the drop down lists within the PCMM application, so that the selection list of values will not require modification by developers and will available immediately.

1. From the **Administration** drop-down menu, select **Manage Reference Data** to display the *Manage Reference Data* screen.
2. Select **Non-VA Provider** role from the **Reference** drop-down list and click **View** to display a list of data.
3. Click a link in the **Name** column to display the **Manage Reference Data** screen.

To edit an existing value:

1. You can enter/change the following information:
    - **Name**
    - **Description**
    - **Sort Order**
    - **Justification**
    - **Check** the box to inactivate the data record, if desired. An **Inactivate Reason** will be required to save the record.
    - If the record is an existing record, the Code cannot be changed

2. Click **Submit/Confirm** to save, **Cancel/Confirm** to exit without saving changes and return to the *Manage Reference Data* screen.
3. You also have the option of selecting another reference type to display. Select another choice from the **Reference: Type** drop down list and click **View**. The *Modify Reference Data* screen will display the **Care Type** and **Focus** data, while the *Manage Reference Data* screen will display for the **Non-VA Provider Role** choice.

To add a New Value:

1. You can add a new value by clicking the **Add New Value** button. The Add Reference Data screen will show. Enter:
    - Code (required)
    - Name (required)
    - Description (required)
    - Sort Order
    - Justification
    - Inactivate (this can be used to initially inactivate -- just entering the data -- and activate at a later date)

- If Inactivate is chosen, an Inactivate Reason text box will display. Enter a reason.

2. Click to **Submit** and save changes, or **Cancel** to cancel.

See also:

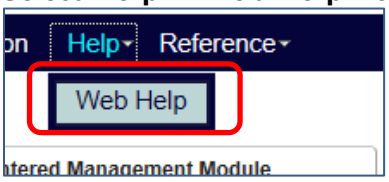
Manage Reference Data
Performing Administrative Tasks

View Help File

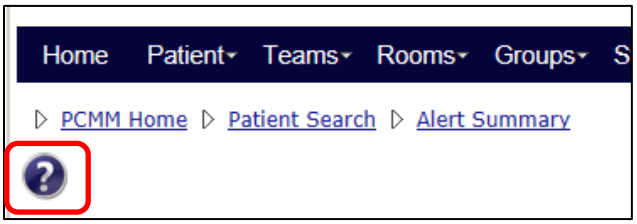
You can view the PCMM Web Help from the Help Menu for step-by-step procedures on how to assign a team, assign a patient to a profile, update a position, and more. Additionally, help hints and information about the application is available in the help file.

To view the help file:

1. Select **Help** > **Web Help** from the main menu to display the PCMM Help File.

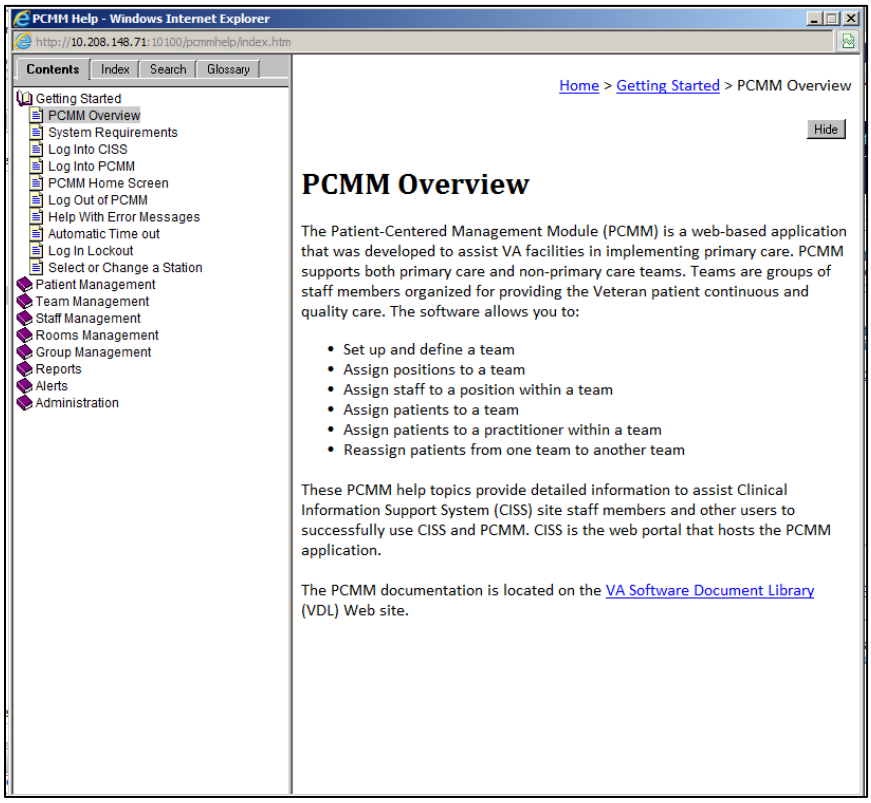


Note: The PCMM help file is also launched by click the icon and is available on the upper left side of the screen, below the Main Menu and bread crumb links.



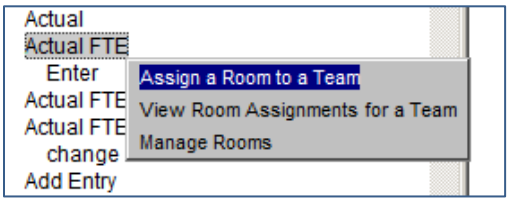
2. You can view the following information by clicking on the Table of Contents icon:
   - **PCMM Overview** – Introduction on PCMM.
   - **System Requirements** – Lists the requirements for PCMM.
   - **Log Into CISS** – Steps to log into CISS.
   - **Log Into PCMM** – Steps to log into PCMM.
   - **PCMM Home Screen** – Explains the context bar, application buttons, menu bar, bread crumb trail, and more in PCMM.
   - **Log Out of PCMM** – Steps to log out of PCMM.
   - **Help With Error Messages** – Helpful hints and information when errors occur in PCMM.
   - **Automatic Time Out** – Information on when PCMM automatically times out on a user.
   - **Log in Lockout** – Information when the system locks out a user.
   - **Select or Change A Station** – Steps to change a station.
   - **Patient Management** – Steps on how to view, assign, and un-assign a patient and more.
   - **Team Management** – Steps on how to manage a team, positions associated with a team, reconcile team models, and more.
   - **Staff Management** – Steps on how to search for VA staff members, assign a staff member to a position, search for a non-VA provider, and more.
   - **Rooms Management** – Steps on how to manage, create, and search for a room and more.
   - **Group Management** – Steps on how to assign, modify, and view a group and more.
   - **Reports** – Steps on how to issue Canned and Ad-Hoc Reports and Background Job log reports.

- **Alerts** – Steps on how to view open and closed alerts.
- **Administration** – Information on performing administrative tasks and steps to modify and manage reference data.
- **Help** – Displays the PCMM help file.
- **Reference** – Provides reference Primary Care Links, Mental Health Links, and OEF/OIF/OND links.



In the PCMM Help File, users can search for a specific topic or subject by selecting the Index, Search, and Glossary tabs.

- **Index** – Lists keywords alphabetical. Click the **keyword** to display a pop-up menu of topics related to the selected keyword. Select the topic to view additional information.



- Search – Enables a user to search for a topic by entering the keyword. All topics with the keyword display, according to rank.
- Glossary – Lists glossary terms alphabetical.

Reference Menu

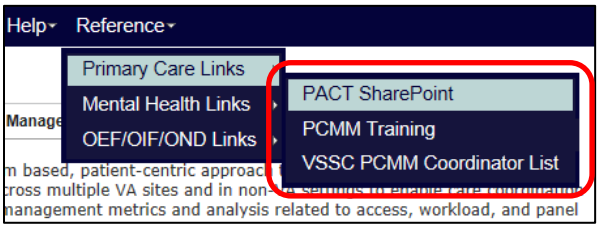
The Reference Menu provides you with easy access to important links, policies and procedures and other publications directly from PCMM Web.

Primary Care Links

1. Select **Reference** > **PACT SharePoint** from the main menu to display the PACT SharePoint site.
    - The SharePoint site provides helpful resources to implement the Patient Aligned Care Team (PACT) at your local facility.

2. Select **Reference** > **PCMM Training** from the main menu to display the Primary Care Management Module (PCMM) Training Home page.
    - The PCMM Training page provides links to training material and information related to PCMM.

3. Select **Reference** > **VSSC PCMM Coordinator List** from the main menu to display the National PCMM Coordinator & Referral Case Manager List.
    - The National PCMM Coordinator & Referral Case Manager List provides a list of PCMM VA facilities and coordinators.



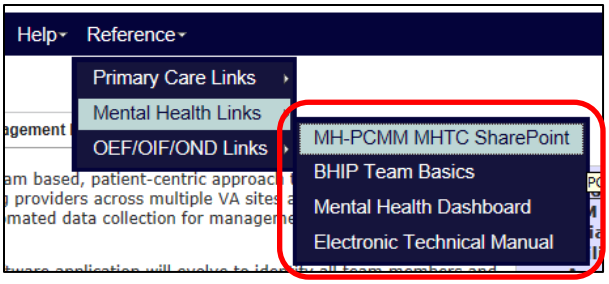
Mental Health Links

4. Select **Reference** > **Mental Health Links** from the main menu to display the Mental Health Services Training Resources SharePoint site.
    - The SharePoint site provides helpful resources to implement the related Mental Health PCMM.

5. Select **Reference** > **BHIP Team Basics** from the main menu to display the Behavioral Health Interdisciplinary Program Teams page.
    - The BHIP page provides tools to help build Collaborative Teams, Veteran Centered Care, and Care Coordination and Access related to mental health care for Veterans.

6. Select **Reference** > **Mental Health Dashboard** from the main menu to display the Mental Health Dashboard report page.
    - The Mental Health Dashboard includes a report summary and stats for several VA facilities.

7. Select **Reference** > **Electronic Technical Manual from** the main menu to display the Technical Reporting Manual.



OEF/OIF/OND Links

GLOSSARY

A

ACOS: Associate Chief of Staff.

Admin Coordinator: The administrative coordinator for Primary Care and Non-Primary Care Teams. This person is involved with administrative (MAS requirements and/or Clinic Administration) duties as well as oversight of the Scheduling process and Primary Care team definition.

Alerts: Alerts are system-generated messages that provide information. Alerts are either Informational or Actionable. You must have the appropriate security access to view alerts.

Arrow: Arrow is a symbol that is used to scroll up and down lists, and left to right for moving objects (patient names, e.g.).

Associate Provider: An Associate Provider is authorized to provide primary care, but cannot act as a Primary Care Provider. In PCMM, a Resident is designated as an Associate Provider. A Nurse Practitioner and/or Physician Assistant may be designated as an Associate Provider also. Per VHA Directive every patient is to be assigned to a Primary Care Provider, who is responsible for coordinating a patient's overall care. Thus, the Associate Provider on a Primary Care Team must be assigned to a preceptor who can be a Primary Care Provider (must have a Primary Care Provider preceptor assigned to them).

Austin Automation Center: The central repository for National Care Patient Care Database.

Auto Team Enrollment/Discharge: This is an option when setting up Teams that will automatically enroll a patient to a TEAM when the patient is enrolled in a clinic that is associated with that team. You can also discharge from a TEAM (if not assigned to a position in a team) when the patient is discharged from a clinic associated with that team.

B

Button Bar: A Button Bar is also referred to as a Tool Bar - small boxes that contain graphic figures that represent various functions.

C

Calendar Display: Within PCMM, when there is a date field, the user can "double click" the field and a miniature calendar will 'pop up' for selection of a date and year. This is used for Activation and Deactivation dates as well as Discharge dates.

Clerk: This person is a clerk who performs data entry.

Context Bar: The dark blue banner at the bottom of the Banner that shows the user's duty station, user name, and log out link. There are also buttons of the applications that the user has permissions to use. If the user is an administrator, they can sign on with no duty station specified (as in the example above) until they begin to perform the functions they have authorization to do.

Clinical Pharmacist: Performs patient care duties related to patient medications as assigned or granted by the appropriate governing committee at the facility. These privileges may include and may or may not be limited to:

(1) Initiation of renewal orders for chronic maintenance medications

(2) Initiation of orders for laboratory tests necessary to monitor existing drug therapy.

Clinical Service: A Service defined at the medical center, e.g. Medicine, Surgery, Intermediate Medicine, etc.

Closing: Another term for 'inactivating' a position or team.

Consults: When a patient is referred to a clinic on a one-time basis, he/she is not normally enrolled in that clinic.

Control Key: A Control Key is the key on the lower left and right hand side of the keyboard that is entitled 'CTRL'. When a user presses this key along with another character (e.g. CTRL + O), the user can select and OPTION, etc.

D

Database: This refers to the information that is stored in your medical center's computer program, e.g., patient information, service information, clinic information, etc.

Dialogue Box: A dialogue box is a box or window that is placed within a screen that allows the user to enter a 'free text' message or description of the object being created (in some cases, the description of what a team is supposed to represent).

Dietitian: Performs patient care duties related to nutrition and weight management.

Display Box: This is a window that displays information or lists available clinics, positions or teams to choose from. The user may select an item from the list displayed.

Double Arrow: Double arrows are two arrows next to each other indicating that more than one patient name may be moved over from an inactive status to an active status and back to an inactive status. (>>)

Drop-Down List: When a user selects an item from the menu bar, a list is displayed in a vertical format. For example, if a user selects **File**, a list drops down showing all options that are available under the main heading **File**: **File, Edit, Print, Save.**

Duty Station: A duty station is a location where a person is based (typically, it is where a person receives a paycheck). It may be a place where health care is not provided, such as a national cemetery or an office building.

E

E-Mail Messages: These are the messages that are generated by a software event that delivers information to designated users via MailMan. E-mail messages in the PCMM module would include information about death notifications, inpatient movements, consult notifications, and team notifications or changes.

F

Footer: The Footer is displayed at the bottom of every window. It displays the version of the application, the copyright date, and a link to contact the application owners.

Functional Station: A location where health care is provided (a treating facility), such as a VA Hospital/Medical Center or clinic.

H

Highlight: To 'Highlight' a name, team, position, or date, one would place the cursor (or arrow) on the name, team, or position they wish to choose and 'click' the mouse button to select it or highlight it.

History File: Although not specific to any one document, a history file is a compilation of various pieces of information pertaining to individual teams, positions, etc. for future reference and clarification.

I

Icon: An Icon is an image or snapshot of something that is visually understood and is represented in a 'box'. For instance, an ICON that stands for 'cutting' a piece of text out of a document would be a box with a picture of a pair of scissors in it. They are also known as 'buttons'.

Intern (Physician): Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include, but may not be limited to, (1) completing history & physical examinations, (2) obtaining blood and other specimens, and (3) provision of patient medical care as permitted. The person cannot act as Primary Care Provider. The Intern is an Associate Provider within a Primary Care Team (see Associate Provider Term).

IRM: Information Resource Management

M

MAS ADPAC: Medical Administration Service Automated Data Processing Applications Coordinator

Medical Student: Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner.

Menu: The list of items on the left side of the window. The Menu displays the actions that are available to you, based on your role.

N

NPCD: National Patient Care Database - is maintained in Austin and receives selected demographic and encounter-based clinical, diagnostic data form VA medical centers. This data enables a detailed analysis of VHA inpatient and outpatient health care activity.

Nurse (LPN): Provides a variety of nursing services that do not require full professional nurse education, but are represented by the licensing of practical and vocational nurses by a State, Territory or the District of Columbia. Persons in these positions may also provide administrative assistance, such as making appointments, etc.

Nurse (RN): Provides care to patients in clinics and other settings, administers anesthetic agents and supportive treatments to patients undergoing outpatient surgery and other medical treatments, promotes better health practices, and consults or advises nurses providing direct care to patients. Persons in this position require a professional knowledge and education in the field of nursing.

Nurse Practitioner: Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, appropriate assessments, orders diagnostic tests and consultations as necessary, prescribes treatment interventions in accordance with established protocols, provides or arranges follow-up care, and provides health teaching and supportive counseling. Is authorized to act as a Primary Care Provider or Associate Provider. The ability to act as a Primary Care Provider is decided by individual facilities.

O

OIF/OEF: Operation Iraqi Freedom/Operation Enduring Freedom.

Other: A general classification for those team members who do not belong in any of the listed Standard Position entries.

P

Panel: A panel is a group of individual patients for which the Primary Care Provider has accepted primary care responsibility.

Patient Panel: Group of individual patients assigned to Team/Position/

Practitioner: Can be either Primary Care or Non Primary Care patients; e.g., the Practitioner's Patients Report includes both Primary Care and Non Primary Care patients assigned to the practitioner in the Patient Panel Count.

Patient Services Assistant: Provides clerical and patient processing support to outpatient clinics, or other unit of a medical facility, in support of the care and treatment given to patients. This includes duties as receptionist, record-keeping duties, clerical duties related to patient care, and miscellaneous support to the medical staff of the unit.

PC Coordinator: Primary Care Coordinator

PCMM: Patient-Centered Management Module

Person Class File: Consists of provider taxonomy developed by Health Care Finance Administration (HCFA). The taxonomy codifies provider type and provider area of specialization for all medical related providers.

Physician Assistant: Performs patient care duties in accordance with Scope of Practice under the supervision of a designated physician or physicians and Medical Center Policy. Duties include, but are not limited to, diagnostic and therapeutic medical care and services, taking case histories, conducting physical examinations, and ordering lab and other studies. Physician Assistants also may carry out special procedures, such as giving injections or other medication, apply or change dressings, or suturing minor lacerations. The ability to act as a Primary Care Practitioner is decided by individual facilities.

Physician-Primary Care: As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. As a Primary Care practitioner, the incumbent provides the first point of assistance for a patient seeking care. Primary Care duties include: (1) Intake and initial needs assessment, (2) Health promotion and disease prevention, (3) Management of acute and chronic biopsychosocial conditions, (4) Access to other components of health care, (5) Continuity, and (6) Patient and non-professional care giver education & training. (from IL 10-93-031, Under Secretary for Health's Letter) Can act as Primary Care Practitioner.

Physician-Psychiatrist: As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) in regard to the practice of Psychiatry.

Physician-Subspecialty: As a physician, incumbent's duties are to advise on, administer, supervise or perform professional and scientific work in one or more fields of medicine. The degree of Doctor of Medicine or Doctor of Osteopathy is a fundamental requirement, along with a current license to practice medicine and surgery in a US State, territory or the District of Columbia. The incumbent is also granted clinical privileges (by the appropriate governing Credentials committee) concerning the practice of Specialty or Subspecialty care in the areas of Medicine or Surgery.

Position: Teams are comprised of one or more staff positions. Individual practitioners are assigned to a team position. A position is designated to serve certain roles in the overall primary care setting.

Preceptor: Responsible for providing the overall care for patients assigned to an Associate Provider or Medical Student. On Primary Care Teams, the Preceptor must be able to provide Primary Care.

Primary Care: Primary care is the provision of integrated, accessible health care services by clinicians that are accountable for addressing a large majority of personal health care needs.

Patient-Centered Management Module (PCMM): Patient-Centered Management Module is the application for VA facilities to use for implementing primary care teams. Teams are created, positions associated with the teams are created, staff members are assigned to positions, and patients are assigned to the teams and positions.

Primary Care Provider: In PCMM, the Primary Care Provider is the position determined to be responsible for the coordination of the patient's primary care.

Psychologist: Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family and group counseling and psychotherapy, assertiveness and other behavior training, etc.

R

Rehab/Psych Technician: Provides patient care in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Psychology and Mental Health. This may include individual, family or group counseling. A degreed Psychologist or Mental health practitioner typically supervises the incumbent.
Remedy Ticket: A support request that is sent to the VA Service Desk.

Resident (Physician): Performs patient care duties in accordance with Medical Center Policy and is supervised by a Preceptor who can act as a Primary Care Practitioner. Duties include, but may not be limited to, completing history and physical examinations, obtaining blood and other specimens, and provision of patient medical care as permitted. The resident is an Associate Provider within a Primary Care Team. As a Resident, the incumbent is responsible for providing patient care as directed by the Preceptor. Cannot act as Primary Care Provider.

Role: A function or task of a staff member involved with the implementation, maintenance and continued success of primary care.

S

Section 508 Compliance: Applications that are Section 508 compliant can be used with assistive technology software.

Social Worker: Performs patient care duties in accordance with Clinical Privileges as assigned or granted by the appropriate governing committee in the area of Social Work. Provides direct services to individuals, groups and families with counseling, discharge planning, crisis intervention, etc.

Specialty Clinics: A set of clinics that are defined as SUBSETS of generalized Service clinics such as Cardiology (specialty of Medicine); Orthopedics (specialty of Surgery), etc.

T

Team: Teams are groups of staff members organized for a certain purpose (e.g., Primary Care).

Team Pharmacist: A pharmacist who: (1) Is authorized to Fill/Dispense medications (2) Enter/Verify medication orders (3) Provide patient education relating to medications (4) Renew established medications under the protocols defined by the medical center.

Team Profile: This is a screen within PCMM that shows the various characteristics of a particular team, e.g., number of patients allowed for enrollment, name, positions assigned, etc.

Text Box: The text box is also known as the DIALOGUE box as described above. It provides the user with an area in which to identify certain characteristics of a particular component of PCMM. For example, the description of what a team is for (provides primary care to patients that have been discharged from the hospital within the last 6 months).

Title Bar: Title bar is the bar that shows the TITLE of the screen that the user is presently accessing. For instance, the TITLE BAR on the Team Set-Up screen could be 'Team Profile.'

Tool Bar: The Tool Bar is what is displayed either at the top of the screen or at the button, and contains a picture of all of the available ICONS that may be chose to perform certain tasks. Unlike the MENU BAR, the menu bar contains the 'words' for functions, whereas the TOOL BAR contains the 'pictures' that represent functions.

Tool Buttons: A tool button is ONE of the icons that is shown across the top (or bottom) of a screen on the TOOL BAR.

TPA: Transition Patient Advocates assist in tracking the treatment of seriously ill veterans of Operation Iraqi Freedom (OIF) and Operation Enduring Freedom (OEF).

U

Uniques: Uniques for the purpose of PCMM Primary Care are defined as the individual veteran (patient) enrolled in VA health care that makes up the primary care provider's panel.

User Class: User Class is a file that will be transported with the Primary Care Management Module that stores the users (physicians, social workers, staff clerks, etc.) actual position titles as defined by the site.

User Profile: A user profile is called My Profile and is accessed from the left menu bar. It contains user information such as the user's role.

V

VistA: Veterans Health Information Systems and Technology Architecture, formerly known as Decentralized Hospital Computer Program, encompasses the complete information environment at VA medical facilities.

VHA: Veteran's Health Administration

VISN: Veterans Integrated Service Network

VSS: Voluntary Service System

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