SD_53_394_RN.doc

Electronic Wait List for Scheduling 5.3 Enhancements

RELEASE NOTES

Patch SD*5.3*394

December 2005

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I. Introduction

The Electronic Wait List (EWL) and Primary Care Management Module (PCMM) Enhancement team would like to announce the release of patch SD*5.3*394 for EWL/PCMM Enhancements Phase II. This patch will address three issues:

1. Service connected percentage and service connected priority for Appointment Management.
2. Service connected percentage and service connected priority for Electronic Wait List.
3. A routine correction for the SD WAIT LIST INQUIRY option which was incidental to number two above.

The detailed functionality of this patch will be addressed in section II of this document.

II. Description of Functionality

This patch enhances Scheduling and EWL (Electronic Wait List) functionality, providing a means of tracking service connected appointments and prioritizing patients waiting for appointments related to their service connected condition.

Patients who are NON-SERVICE CONNECTED will not be affected by this patch.

The data in the SERVICE CONNECTED PERCENTAGE (#.302) field of the PATIENT (#2) file is added to the SD WAIT LIST (#409.3) file. The modified option SD EWL BACKGROUND JOB monitors the field SERVICE CONNECTED PERCENTAGE (#.302) in the PATIENT (#2) file on a nightly basis and appropriately updates the new field SERVICE CONNECTED PERCENTAGE (#14) in file SD WAIT LIST (#409.3) when the SERVICE CONNECTED PERCENTAGE (#.302) field changes in the PATIENT (#2) file. If the SERVICE CONNECTED PERCENTAGE (#.302) field changes, a Mailman bulletin with a subject line of "EWL Service Connection Patient Update with SC Priority" is sent to members of the mail group SD EWL BACKGROUND UPDATE, listing the patients' names whose SERVICE CONNECTED PERCENTAGE (#.302) changed.

The field SERVICE CONNECTED PRIORITY (#15) is the other new field added to file SD WAIT LIST (#409.3), which is set to 'YES' if the EWL entry is a priority appointment. Patients with a service connected percentage greater than 49% automatically have priority, while those patients with a service connected percentage less than 50% only have priority if their appointment is related to their service connected condition. If a patient's service connected percentage changes, the following rules are applied to the patient's service connected priority:

- The SERVICE CONNECTED PRIORITY (#15) field will be set to 'YES' if the SERVICE CONNECTED PERCENTAGE (#.302) field changes from less than 50% to greater than 49%.

- A Mailman bulletin with a subject line of "EWL Service Connection Patient Update with SC Percentage Change" will be sent to members of the mail group SD EWL BACKGROUND UPDATE if the SERVICE CONNECTED PERCENTAGE (#.302) changes from greater than 49% to less than 50%. This bulletin will also be sent to the above mail group if the SERVICE CONNECTED PERCENTAGE (#.302) is initially less than 50% and changes to a different value that is also less than 50%, but less than its initial SERVICE CONNECTED PERCENTAGE (#.302) field value. The bulletin will list the patient(s) and include an additional note, "EWL SC PRIORITY MAY REQUIRE MANUAL UPDATE PLEASE REVIEW". Each site will determine whether the SERVICE CONNECTION PRIORITY (#15) needs updating and will need to change this field manually.

- The new option Service Connected Wait List (Sch/PCMM) Edit [SD WAIT LIST SC PRIORITY EDIT] was created to edit the new field SERVICE CONNECTED PRIORITY (#15). This new option is not attached to any menus. The EWL coordinator at each site should determine who will be assigned this option.

The options Appointment (Sch/PCMM) Wait List Report [SD WAIT LIST APPT REPORT] (detailed report only) and Inquire Wait List (Sch/PCMM) [SD WAIT LIST INQUIRY] are modified to display the field SERVICE CONNECTED PRIORITY (#15). During installation,

the SERVICE CONNECTED PRIORITY field in the SD WAIT LIST file will be set. This field will be set to NO for current patients in this file with eligibility of SC less than 50%. Some of these patients may be on the wait list for service connected disabilities. It is up to the site to determine if these entries should be changed to YES. A printout of the Appointment (Sch/PCMM) Wait List Report [SD WAIT LIST APPT REPORT] (detailed only) will list all patients and display the field SERVICE CONNECTED PRIORITY.

When adding a patient to the Wait List, the patient's service connected percentage and rated disabilities are displayed. If the patient is less than 50% service connected and has rated disabilities, a prompt will ask if the appointment is for a service connected condition (Y or N). If a patient is less than 50% service connected and has no rated disabilities, the prompt will not display and the SERVICE CONNECTED PRIORITY (#15) field is not set (i.e. its value will not change). If the patient is greater than 49% service connected, the prompt is not displayed because patients with a service connected percentage greater than 49% automatically have priority. If the appointment is SERVICE CONNECTED, the SERVICE CONNECTED PRIORITY (#15) field is set to 'YES' and is stored in SD WAIT LIST (#409.3).

A new appointment type 'SERVICE CONNECTED' is added to the APPOINTMENT TYPE file (#409.1). When entering the option 'MAKE APPOINTMENT [MA]'[SDM] or 'UNSCHEDULED VISIT [UN]'[SDI] in APPOINTMENT MANAGEMENT [SDAM APPT MGT], users will see each patient's service connected percentage and rated disabilities. If a patient is less than 50% service connected, a prompt will ask the user if the appointment is for a service connected appointment (Y or N). The 'APPOINTMENT TYPE ' prompt is then displayed. If the DEFAULT APPOINTMENT TYPE (#2507) for a clinic in the HOSPITAL LOCATION (#44) file is 'REGULAR' and the answer to the service connected appointment prompt is Y, then the APPOINTMENT TYPE prompt will change to be 'SERVICE CONNECTED'. If the DEFAULT APPOINTMENT TYPE (#2507) for a clinic in the HOSPITAL LOCATION (#44) file is not 'REGULAR' and the answer to the service connected appointment question is Y, the APPOINTMENT TYPE prompt will display the value in the DEFAULT APPOINTMENT TYPE (#2507) field. If the answer to the service

connected appointment question is N, the APPOINTMENT TYPE prompt will display the value in the DEFAULT APPOINTMENT TYPE (#2507) field. If at Check-out (Appointment Check-in/Check-out) the provider answers the question 'Is this appointment for an SC condition' different from the answer given by the user making the appointment - the provider's answer will take precedence and set the APPOINTMENT TYPE.

If the following discrepancies exist between PRIMARY ELIGIBILITY CODE(#.361), SERVICE CONNECTED PERCENTAGE (#.302) and SERVICE CONNECTED? (#.301) in the PATIENT file (#2) when making an appointment, the error message "'SC Percent','Service Connected' and 'Primary Eligibility Code' are OUT OF SYNC, Please CORRECT the problem" is displayed on the screen notifying the user:

- If SERVICE CONNECTED? (#.301) equals NULL, the error message is displayed.

- If SERVICE CONNECTED? (#.301) equals YES, PRIMARY ELIGIBILITY CODE (#.361) must be a service connected eligibility (i.e. equals "SC LESS THAN 50%" or "SERVICE CONNECTED 50% to 100%") and SERVICE CONNECTED PERCENTAGE (#.302) must be greater than 0, or the error message is displayed.

- If SERVICE CONNECTED? (#.301) equals NO, PRIMARY ELIGIBILITY CODE (#.302) must be a non service connected eligibility and SERVICE CONNECTED PERCENTAGE (#.302) must be 0 or NULL, or the error message is displayed.

Also included in this patch is a correction to routine SDWLI, which has had three NOIS calls reporting an undefined error when inquiring to Wait List entries. These NOIS calls are:

Primary Call: CHA-0303-30460
Duplicates: SBY-1103-31157
ANN-0204-41710

III. Installation and Implementation

Specific information pertaining to the installation of this patch can be found in the patch description and section referred to as 'INSTALLATION INSTRUCTIONS' in patch SD*5.3*394. Implementation will be seamless after the installation of the patch. Any implementation training should be scheduled at the site if required.

IV. Data Dictionary Modifications

In the SD WAIT LIST (#409.3) file, two fields are added:

- SERVICE CONNECTED PERCENTAGE (#14) which is a numeric value (0-100) and populated during the 'SD EWL BACKGROUND JOB' option. This field is determined by the value in the PATIENT file (#2) field 'SERVICE CONNECTED PERCENTAGE' (#.302).
- SERVICE CONNECTED PRIORITY (#15) which is a 'YES' or 'NO' value is determined by the patient's service connected percentage and during the 'MAKE APPOINTMENT' option if the user indicates that this visit is service connected. The 'SD EWL BACKGROUND JOB' option also populates this field as determined by the patient's service connected rated disabilities and percentage.

In addition, the 'APPOINTMENT TYPE' file (#409.1) will be updated with the new 'SERVICE CONNECTED' appointment type. This new appointment type will default if the patient meets the criteria for a 'SERVICE CONNECTED' appointment.

V. Technical Information

Electronic Wait List, patch SD*5.3*394, contains the following new fields and entries:

File	Field
409.3 SD Wait List	14 SERVICE CONNECTED PERCENTAGE
409.3 SD Wait List	15 SERVICE CONNECTED PRIORITY
409.1 APPOINTMENT TYPE	NEW ENTRY: SERVICE CONNECTED

EWL, SD*5.3*394, requires the following patches:

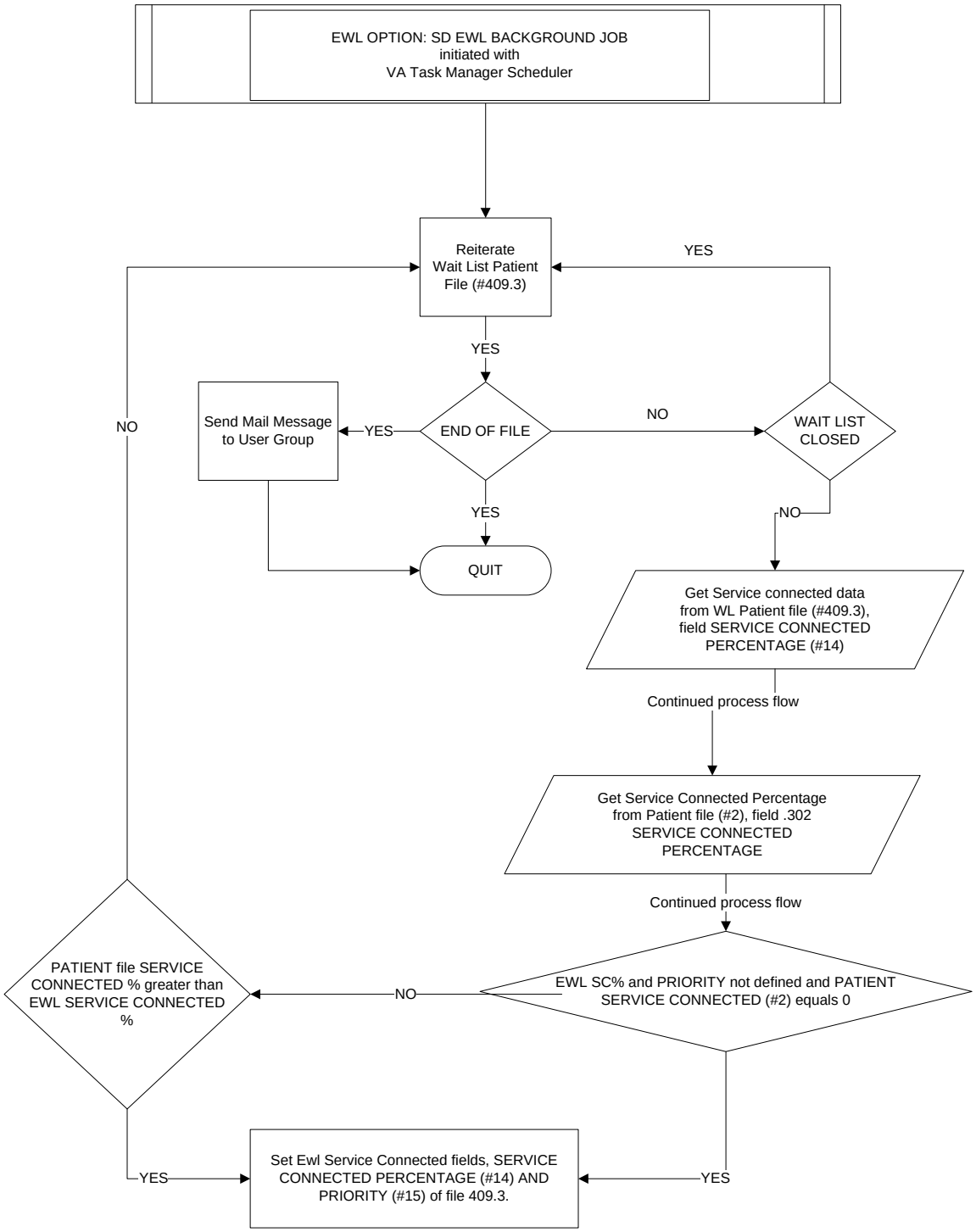
- SD*5.3*263
- SD*5.3*273
- SD*5.3*280
- SD*5.3*296
- SD*5.3*325
- SD*5.3*327
- SD*5.3*399
- SD*5.3*459

For additional information on patch dependencies, please refer to the Electronic Wait List installation section of patch SD*5.3*394.

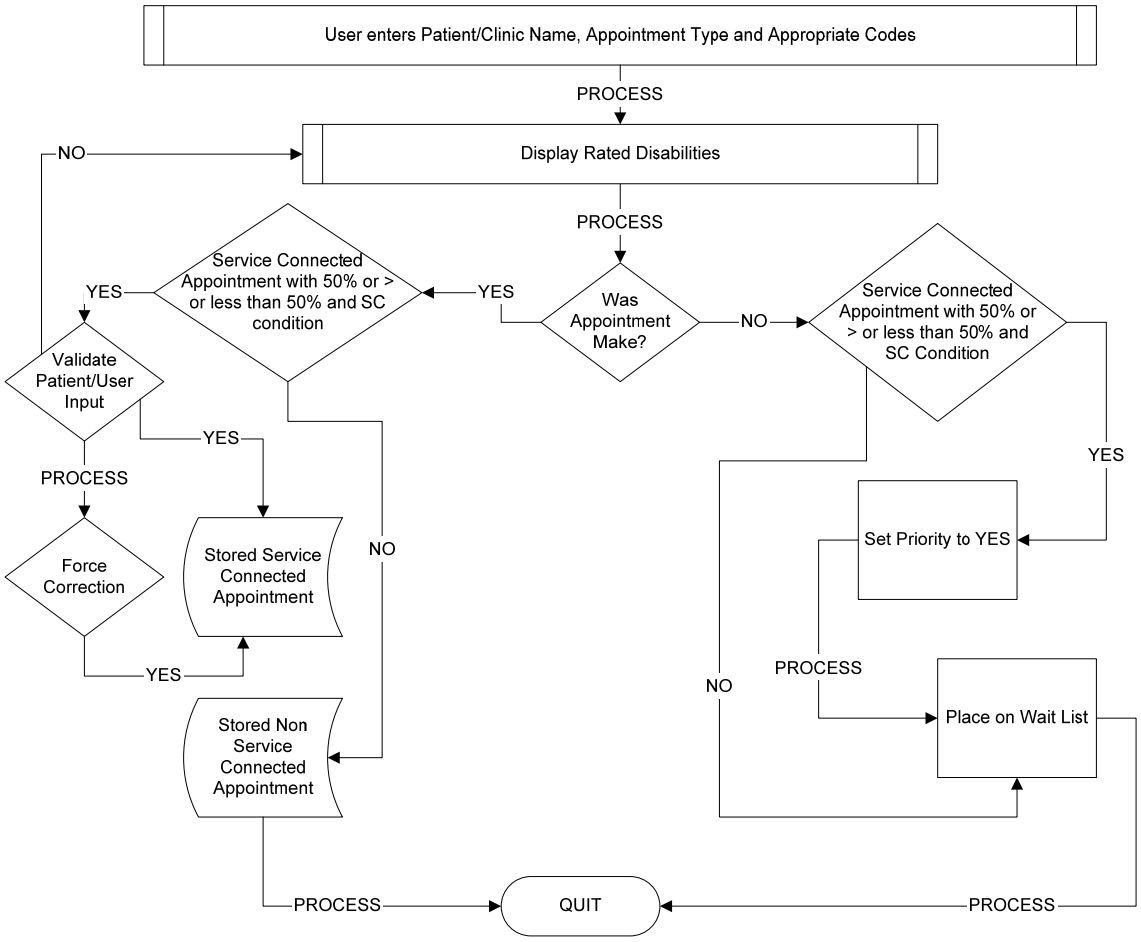
1. Flow Charts:

Starting on the next page are flow charts for the processes that occur when the Electronic Wait List option: SD EWL BACKGROUND JOB is invoked, when a SERVICE CONNECTED appointment is put on the Electronic Wait List, and when the SD WAIT LIST SC PRIORITY EDIT option is invoked.

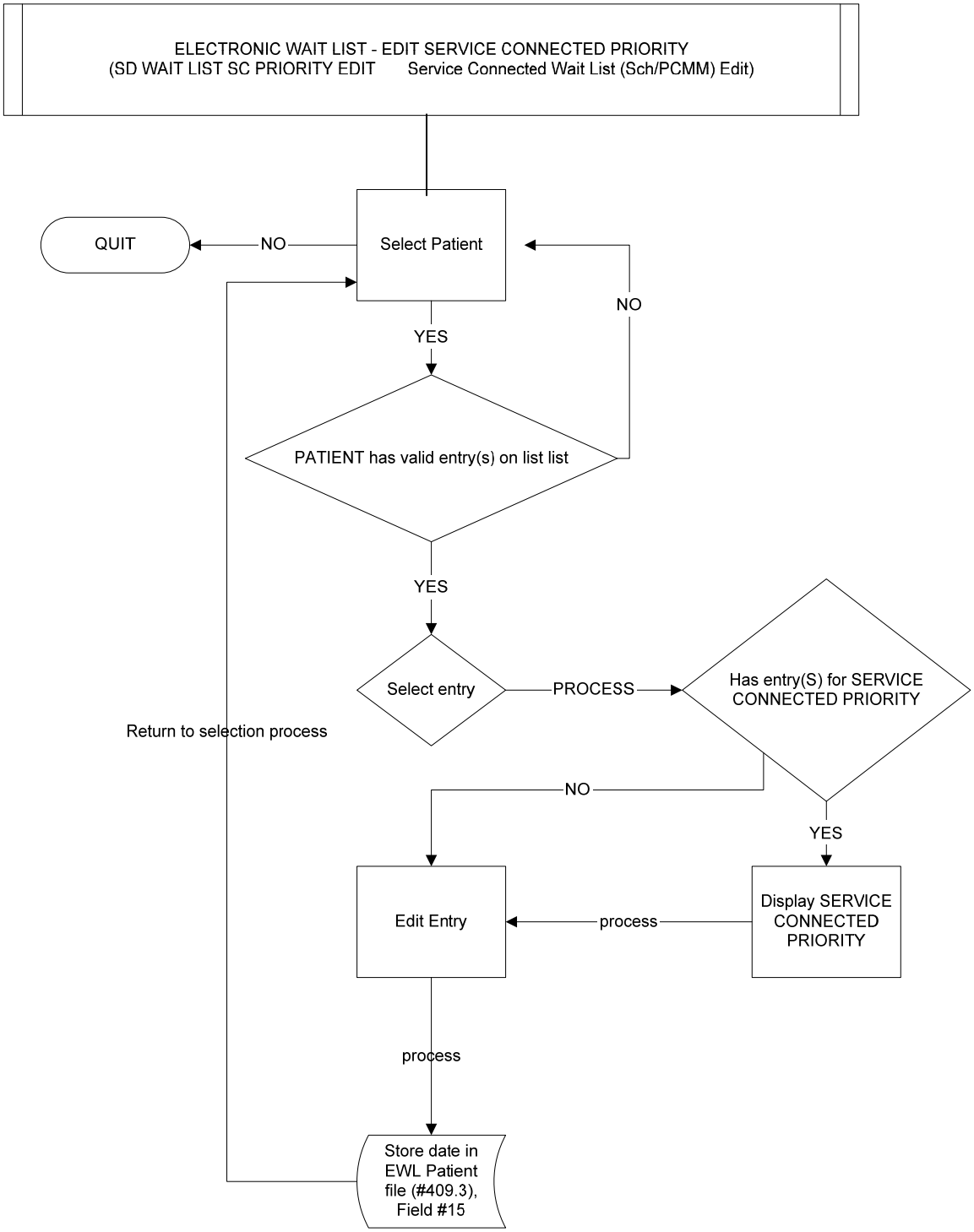
SD EWL BACKGROUND JOB TASK



Electronic Wait List SERVICE CONNECTED appointment



Electronic Wait List - EDIT SERVICE CONNECTED PRIORITY



2. Routine Summary

Four new routines are included with this patch, as follows:

SDAMVSC
When there is an existing appointment, this routine validates the 'APPOINTMENT TYPE' field in the 'OUTPATIENT ENCOUNTER' and 'PATIENT' files in regard to the outpatient classification question 'Was treatment for a SC Condition?' The routine validates that both files are in sync with the answer to the prompt.

SDWLP394
During installation, this routine seeds the SD WAIT LIST file (#409.3), fields SERVICE CONNECTED PERCENTAGE (#14) and SERVICE CONNECTED PRIORITY (#15) and places the SDAM APPOINTMENT TYPE VALIDATION on the SDAM APPOINTMENT EVENTS menu. This routine will be deleted following installation.

SDWLSC
This routine is invoked when a patient is placed on a Wait List and prompts the user for 'SERVICE CONNECTED APPOINTMENT' status.

SDWLSCPE
This routine is the SD WAIT LIST - EDIT PRIORITY option which enables users to edit the SD WAIT LIST file, SERVICE CONNECTED PRIORITY field #15 for a specific patient's record.

The following routines are associated with the 'MAKE APPOINTMENT' and 'SD WAIT LIST ENTRY/EDIT' options for the new functionality of SERVICE CONNECTED appointment:

- SDM4
- SDWLE111
- SDWLE113

The following routines were modified to display the new 'SERVICE CONNECTED PRIORITY' on the options, SD WAIT LIST APPT

REPORT Appointment (Sch/PCMM) Wait List Report and SD WAIT LIST INQUIRY Inquire Wait List (Sch/PCMM):

- SDWLRPT1
- SDWLI

3. Menu Options

One new Electronic Wait List option was added with this patch:

- Service Connected Wait List (Sch/PCMM) Edit [SD WAIT LIST SC PRIORITY EDIT]

Three Electronic Wait List options were modified:

- Appointment (Sch/PCMM) Wait List Report [SD WAIT LIST APPT REPORT]
- Inquire Wait List (Sch/PCMM) [SD WAIT LIST INQUIRY]
- SD EWL BACKGROUND JOB SD EWL BACKGROUND JOB

4. Bulletins

The mail group SD EWL BACKGROUND UPDATE group will receive the appropriate message from the SD EWL BACKGROUND JOB option.

Below are samples of the mail messages:

Message 1:

Subj: EWL Service Connection Patient Update with SC Priority [#165697]
12/09/04@09:28 4 lines
From: POSTMASTER In 'IN' basket. Page 1 *New*

Patient Name	SSN	OLD-EWL/SC %	NEW-EWL/SC %	PRI
HXXXXXXXXX,XXXX	9999	40	50	YES

Message 2:

Subj: EWL Service Connection Patient Update with SC Percentage Change [#165699] 12/09/04@09:48 6 lines
From: POSTMASTER In 'IN' basket. Page 1 *New*

Patient Name	SSN	OLD-EWL/SC %	NEW-EWL/SC %	PRI
** NOTE: EWL SC PRIORITY MAY REQUIRE MANUAL UPDATE.PLEASE REVIEW **				
HXXXXXXXXX,XXXX	9999	30	40	YES

5. Background Jobs

One background job was modified in patch SD*5.3*394:

SD EWL BACKGROUND JOB SD EWL BACKGROUND JOB

Description: Routine SDWLQSC will run in the background as scheduled to determine patient changes in the patient's service connected disabilities. If a change has been determined, it will correct the priority of the Wait List visit. A MailMan message will then be sent to the appropriate user group (SD EWL BACKGROUND UPDATE).

6. Data Dictionary Modification

For SD Wait List file (409.3)

DD Description:

409.3,14 SERVICE CONNECTED PERCENTAGE SC;1 NUMBER

INPUT TRANSFORM: K:+X'=X!(X>100)!(X<0)!(X?.E1"."1N.N) X

409.3,15 SERVICE CONNECTED PRIORITY SC;2 SET

'0' FOR NO;

'1' FOR YES

409.1,.01 APPOINTMENT TYPE

NEW ENTRY: SERVICE CONNECTED

VI. Database Integration Agreements:

Two IA agreements were required:

- DBIA - 1476 for reference to PRIMARY ELIG. ^DPT(IEN,.372).
- DBIA - 427 for reference to ^DIC(8).

VII. Business Rules Tables:

The following tables document the business rules related to the changes included in patch SD*5.3*394.

SD EWL BACKGROUND JOB OPTION:

PATIENT FILE SC	EWL SC	SC PERCENTAGE UPDATE	PRIORITY UPDATE	MESSAGE TYPE
('<50) & (=)	(<50) & (=)	NO	NO	NONE
<50	('<50)	YES	NO	MESSAGE 2
>49 & (=)	>49 & (=)	YES	YES	NONE
<50 & (=)	<50 & (=)	NO	NO	NONE
>49	<50	YES	YES	MESSAGE 1
<50 & (=)	<50 & (=)	YES	NO	MESSAGE 2

MAKE APPOINTMENT SERVICE CONNECTED APPOINTMENT CRITERIA.

SERVICE CONNECTED	SC PERCENTAGE	PRIMARY ELIG	RESULT
NO	**>49%**	**SERVICE CONNECTED 50 - 100**	**Error Mess**
NO	**<50%**	**SERVICE CONNECTED 50 - 100**	**Error Mess**
NO	**NULL**	**SERVICE CONNECTED 50 - 100**	**Error Mess**
NO	>49%	NULL	Error Mess
NO	<50%	NULL	Error Mess
NO	**NULL**	**NULL**	**Error Mess**
NO	>49%	OTHER STATUS	Error Mess
NO	<50%	OTHER STATUS	Error Mess
NO	**NULL**	**OTHER STATUS**	**No Mess**
NO	>49%	SC LESS THAN 50	Error Mess
NO	**<50%**	**SC LESS THAN 50**	**Error Mess**

SERVICE CONNECTED	SC PERCENTAGE	PRIMARY ELIG	RESULT
NO	**NULL**	**SC LESS THAN 50**	**Error Mess**
NULL	>49%	SERVICE CONNECTED 50 - 100	Error Mess
NULL	<50%	SERVICE CONNECTED 50 - 100	Error Mess
NULL	**NULL**	**NULL**	**Error Mess**
YES	NULL	SERVICE CONNECTED 50 - 100	Error Mess
YES	**>49%**	**NULL**	Error Mess
YES	**<50%**	**NULL**	**Error Mess**
YES	NULL	NULL	Error Mess
YES	>49%	OTHER STATUS	Error Mess
YES	<50%	OTHER STATUS	Error Mess
YES	NULL	OTHER STATUS	Error Mess
YES	**>49%**	**SC LESS THAN 50**	**Error Mess**
YES	**<50%**	**SC LESS THAN 50**	**No Mess**
YES	**NULL**	**SC LESS THAN 50**	**No Mess**
YES	**>49%**	**SERVICE CONNECTED 50 - 100**	**No Mess**
YES	**<50%**	**SERVICE CONNECTED 50 - 100**	**Error Mess**
YES	**NULL**	**NULL**	**Error Mess**