Authorization Subscription Setup Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Authorization Subscription Utility version 1.0			
The Authorization/Subscription Utility (ASU) implements a User Class Hierarchy which is useful for identifying the roles that different users fulfill within the hospital. It also provides tools for creating business rules that apply to documents used by members of such groups. ASU provides a method for identifying who is AUTHORIZED to do something			ASU Version 1 is distributed and installed with Text Integration Utilities (TIU) Version

Business Rules/ Roles/Classes and Actions have been defined for the Primary Document Definitions in 8925.1.

Additional Rules may need to be created for new Document Definitions (8925.1) or new User Classes.

** There are several USR Patches that have instructed sites to delete/modify Rules to comply with OIG and the HIMS handbook. Start with USR*1*30 |
A. Manuals			These documents can be found out on the VistA Document Library Clinical – CPRS/Authorization Subscription Utility
1) ASU Technical Manual			
2) ASU User Manual			
B. Security Keys			
1) NO security Keys			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
C. Mailman Groups			
1) None			
D. Options / Menus			The primary options for ASU are for the IT specialist or Clinical Coordinator
1) User Class Management			

a) User Class Definition
    b) List Membership by User
    c) List Membership by Class
    d) Manage Business Rules
			These 4 options will allow the definition of User Classes (hierarchal)
			*NOTE: by default all users are considered to have the USER class.
			
			The Clinical Coordinator will need to have the user class of CAC.
			
			Chief of HIMS needs to have that user class as there is hard coding that looks for the users of that class
			
			Membership has to be given to all users if special authorization is to be given, with activation date and termination date when leaving. A end-user that does not need special authorization, can have 'no' user class assigned, they will be default be seen as the USER Class of USER
			
			Managing business rules should be reviewed before changing or adding. It is strongly recommended that caution should be made when adding

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
			or deleting.
E. Files and Globals			
			Most globals for the ASU package ^USR have data.
1) USR AUTHORIZATION/SUBSCRIPTION (#8930.1)			This file associates users with actions on documents.

Actions Authorization
Subscription Authorization

A business rule then will contain 4 parts.

Document Definition (8925.1)
Status (8930.6)
Action (8930.8)
User Class(8930) or Role (8930.2) |

File Name	File #	Global	Data
USR CLASS	8930	^USR(8930	Yes
USR AUTHORIZATION/SUBSCR	8930.1	^USR(8930.1	Yes
USR ROLE	8930.2	^USR(8930.2	Yes
USR CLASS MEMBERSHIP	8930.3	^USR(8930.3	
USR SEARCH CATEGORIES	8930.4	^USR(8930.4	Yes
USR RECORD STATUS	8930.6	^USR(8930.6	Yes
USR ACTION	8930.8	^USR(8930.8	Yes

Text Integration Station Creation Checklist

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Text Integration Utility Version 1.0 Text Integration Utilities (TIU) is a collection of software tools that manage clinical documents in a standardized way. They allow clinicians and other users to view, enter, edit, sign, and print different kinds of documents from a single program.			TIU and ASU packages were installed at the same time, TIU is dependent on ASU to provide the authorization or subscription to the different TIU Titles that are available Some of the site-configurable features which must be addressed before implementation are: • Document definition hierarchy • User Class definition • Document upload specifications • Interdisciplinary Notes • Signature, signature block, and electronic signature considerations • Clinician, MAS, and transcriptionist review/release issues
A. Manuals			Clinical Documents/CPRS Text Integration Utility
1) Installation Guide			These procedures will not need to happen as the database has TIU installed… it just needs to be set up.
2) Implementation Manual			The guide contains help in the following areas:

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
			Setting up User Classes, Business Rules, Document Definitions, site parameters, and menus Using the upload process for other reports (with storage outside TIU) Troubleshooting TIU and ASU
3) Technical Manuel			Technical aspects for the setup of TIU files.
4) Clinical Coordinator User Manual			The main manual that CACs should reference.
5) Quick Reference Guild			This would be an outdated document as the LM version of TIU is not utilized by clinicians
6) Generic HL7 Interface Guide			Guide to help with the setup of the Protocol files for HL7 messaging for TIU files.
7) TIU Data Standardization Manual			Local titles are mapped to National Standardized Titles that are maintained in File 8926.1 TIU VHA ENTERPRISE STANDARD TITLE.
B. Security Keys			
1) None			
C. Mailman Groups			
1) None			
D. Taskman Jobs			
1) TIU NIGHTLY			This is a nightly task that will

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
			traverse the TEXT INTEGRATION UTILITIES (TIU) database, and send alerts when a document is overdue for signature, update missing Discharge Dates now available through Bed Control, purge documents for which the Grace Period for Purge has been exceeded, and delete all records in the Upload Buffer file that are older than 30 days.
2) TIU MISSING COSIGNER NITE JOB			
3) TIU PRINT PN BATCH SCHEDULED			This option is most likely not in use unless printing a backup
E. Options/Menus			

1) [TIU IRM MAINTENANCE MENU] IRM Maintenance Menu
  1   TIU Parameters Menu ...
          1   Basic TIU Parameters
          2   Modify Upload Parameters
          3   Document Parameter Edit
          4   Progress Notes Batch Print
          5   Division - Progress Notes Print
  2   Document Definitions (Manager) ...
          1   Edit Document Definitions
          2   Sort Document Definitions
          3   Create Document Definitions
          4   Create Objects
          5   Create TIU/Health Summary Objects
  3   User Class Management ...
          1   User Class Definition
          2   List Membership by User
          3   List Membership by Class
          5   Manage Business Rules
			Menu that will be used to set up the basic parameters (Basic, Upload, Document Parameters & Division parameters)
			
			Creating and editing the document definitions. Special requirements for PN, DSC, Consults, AP and OP
			Managing the ASU package – business rules and user classes.
			
			Templates are created in CPRS

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS

4   TIU Template Mgmt Functions ...
      1   Delete TIU templates for selected user.
      2   Edit auto template cleanup parameter.
      3   Delete templates for ALL terminated users.
5   TIU Alert Tools
 	
6   Active Title Cleanup Report
7   TIUHL7 Message Manager
     Title Mapping Utilities ...
      1   Map ACTIVE LOCAL Titles
      2   Selected Active Title Map
      3   Mapping Workbench
      4   Add/Edit Synonyms ...
			Notes Tab
			
			Managing alerts, templates and mapping document definitions to the national standardized titles.
			
			Setting up for HL7 for messaging, (HomeTelehealth)
			
			TIU Standardization – see TIU*1*211 documentation

2) [TIU MAIN MENU MGR] Text Integration Utilities (MIS Manager) -- MIS Managers Menu --- 1 Individual Patient Document 2 Multiple Patient Documents 3 Print Document Menu ... 4 Search for Selected Documents 5 Statistical Reports ... 6 Unsigned/Uncosigned Report 7 Missing Text Report 8 Missing Text Cleanup 9 Signed/unsigned PN report and update 10 UNKNOWN Addenda Cleanup 11 Missing Expected Cosigner Report 12 Mark Document as 'Signed by Surrogate' 13 Mismatched ID Notes			This is the main menu used by HIMS to manage actions that must be taken on documents in various statuses.
3) [TIU MAIN MENU MRT]Text Integration Utilities (MRT) --- MRT Menu --- 1 Individual Patient Document 2 Multiple Patient Documents			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
3 Review Upload Filing Events 4 Print Document Menu ... 5 Released/Unverified Report 6 Search for Selected Documents 7 Unsigned/Uncosigned Report 8 Reassignment Document Report 9 Review unsigned additional signatures			
4) [TIU MAIN MENU TRANSCRIPTIONIST] Text Integration Utilities (Transcriptionist) --- Transcriptionist Menu --- 1 Enter/Edit Discharge Summary 2 Enter/Edit Document 3 Upload Menu ... 4 List Documents for Transcription 5 Review/Edit Documents			Menu given if manual entry or uploading is performed by person other than providers
5) [TIU MAIN MENU CLINICIAN] Progress Notes/Discharge Summary [TIU] 1 Progress Notes User Menu ... 2 Discharge Summary User Menu ... 3 Integrated Document Management ... 4 Personal Preferences ...			Typically this is not given out any longer. User should be using CPRS for note entry
F. Files / Globals			
			Files from the installation have globals that have data populated

File Name	#	Global	Data
TIU Document	8925	^TIU(8925	
TIU Document	8925.1	^TIU(8925.1	Yes

ACTIVITY				STATUS	RESPONSIBLE	COMMENTS
Definition						
TIU Upload Buffer	8925.2	^TIU(8925.2				
TIU Upload Error Definition	8925.3	^TIU(8925.3	Yes			
TIU Upload Log	8925.4	^TIU(8925.4				
TIU Audit Trail	8925.5	^TIU(8925.5				
TIU Status	8925.6	^TIU(8925.6	Yes			
TIU Multiple Signature	8925.7	^TIU(8925.7				
TIU Search Categories	8925.8	^TIU(8925.8	Yes			
TIU Problem Link	8925.9	^TIU(8925.9				
TIU External Data Link File	8925.91	^TIU(8925.91				
TIU Print Parameters	8925.93	^TIU(8925.93				
TIU Division Print Parameters	8925.94	^TIU(8925.94				
TIU Document Parameters	8925.95	^TIU(8925.95	Yes			
TIU Conversions	8925.97	^TIU(8925.97	Yes			
TIU Personal Document Type List	8925.98	^TIU(8925.98				
TIU Parameters	8925.99	^TIU(8925.99				
TIU Personal Preferences	8926	^TIU(8926				