PATS Setup Checklist

DATA CLEANUP CHECKLIST (Complete the following tasks by _____):

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
1. Review and report any changes to the Project Implementation Office (PIO) regarding your site's official Points-of-Contact (POC)—both business POC and technical POC.		IRM Staff and Patient Advocates	
2. Determine A. who will use the new PATS system and the role they will perform. B. which user(s) will perform pre-migration data cleanup. C. which user will download the national divisions list and perform migration of production Patient Rep data into PATS.		Patient Advocate Staff	
3. Determine A. Download national station list B. Oversee data cleanup C. Perform the data migration		Data Migration Manager	
4. Clean up Patient Rep data prior to migrating the data into PATS.		User performing data cleanup	
5. Add an ROC (Report of Contact) 6. Edit an ROC entered by the person		SIT – Site Information Taker	

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
7. Add or edit their ROCs 8. Edit ROCs entered by others 9. Send notifications 10. Run reports (Standard and Ad hoc) 11. Update local reference tables: Congressional Contact, Hospital Locations, Comps, Resolution Tex		SRCU – Site Record Control User (Patient Advocate)	
12. Same as SRCU with the additional task of updating Facility Service or Section reference table.		VU – VISN User (VISN-Level Advocate)	
13. Give the list of users and their roles to your IRM staff so they can assign new Options, Divisions and Security keys to those users.			
14. Ensure the following are completed: A. Review Chapter 1 of the *PATS Installation Guide for IRM Staff*. B. Validate/set up VistaLink Connector Proxy Users **and double-check that it is still active – not expired or DISUSERed.** C. Run the Fileman report and send the output (list of divisions) to Chuck Krochmal, Project Implementation Office (PIO). D. Install Patch VistA QAC*2*19. E. Obtain the list of all PATS application		IRM Staff	

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
users and the roles they will perform from your Patient Advocates. F. Assign Patient Advocates the necessary security keys, menu options, divisions, and URLs. (For detailed in formation, see the *PATS Installation Guide for IRM Staff.*) see chart at end of checklist			
15. Download list of valid national divisions (station numbers) for your default institution. This list will be used by the data error checking option to verify that only valid national stations are referenced by your Reports of Contact.		PATS Migration Manager	
16. Ensure the following are completed: A. Run the VistA menu to Check for Data Errors Prior to Migration. B. Use APPENDIX A in the *PATS Data Migration Guide* to understand errors and the appropriate cleanup process. C. *Optional:* Run the Auto-Close ROC option. D. Complete cleanup activities before _____. E. Attend PATS Training sessions.		Patient Advocate Staff	
17. VISN-level Advocate: Decide what values should be in the Facility Service or Section reference table.			

ACTIVITY	STATUS	RESPONSIBLE	COMMENTS
18. Patient Advocates: Decide what values should be in the Hospital Locations, Comps, and Boilerplate Resolution reference tables			

Chart for assigning Security Keys and Options for Roles

Role	Security Key	Options	Divisions	URLs
Data Migration Manager	QACV_DMGR	QACI MAIN PATS MIGRATION MENU (synonym PRDM) QACI PATS RPC ACCESS	3 digit default institution	PATSDV application (Download national station numbers) PATSDM application (Data Migration)
User(s) performing data cleanup	None	QACI MAIN DATA CLEANUP MENU (synonym PRDC)	None	None
SIT ⚠️	QACV_SIT	QACV PATS RPC ACCESS DGRR GUI PATIENT LOOKUP DGRR PATIENT SERVICE QUERY	All divisions whose data the user should access. If no divisions are assigned, the person can only access the 3-digit default institution.	PATS application
SRCU ⚠️	QACV_SRCU	Same as SIT	Same as SIT	PATS application
VU (VISN-level Advocate) ⚠️	QACV_SRCU and QACV_VU	Same as SIT	Same as SIT	PATS application

⚠️ *Only assign an individual ONE of the following roles: SIT, SRCU, VU.*