



RESOURCE AND PATIENT MANAGEMENT SYSTEM

IHS Patient Registration GUI

(AGG)

User Manual

Graphical User Interface Extension to the RPMS
Patient Registration Module (AG)

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Preface

The Indian Health Service (IHS) Patient Registration graphical user interface (GUI) application is the basis of most Resource and Patient Management System software, providing for the entry of new patients and editing of those already registered at a facility. Patient registration is very important to third-party billing of patient care. Appropriate caution and checking should be employed to ensure that accurate data is maintained by patient registration and, subsequently, transmitted to the National Patient Information Resource System.

1.0 Introduction

The Patient Registration graphical user interface (GUI) application provides a means of managing patient data while utilizing a more user friendly approach. It provides a means of tracking a complete, accurate, and current patient profile to assist in evaluation, and billing of patient care provided. The Patient Registration application ensures that the most accurate patient data is maintained.

The Patient Registration GUI application is a Windows-based, client-server GUI to the Indian Health Service (IHS) Resource and Patient Management System (RPMS). This application is designed to provide its users with an efficient, dependable way to ensure the viability and accessibility of all essential information existing on the computer system.

The IHS Patient Registration GUI application:

- Enables the entry of new patients into the system
- Enables editing of patients already registered at the facility
- Enables billing of third parties for patient care
- Prints reports pertaining to the various patient classifications

The chapters included in the manual cover the main components of the application.

- New Patient: contents and navigation of a new patient record as well as Mini Registration (see Section 4.0 New Patient)
- Updating Patient Data: content and navigation of an existing patient record (see Section 5.0 Updating Patient Data)
- Reports: Content (see Section 6.0 Reports)

2.0 System Navigation

This section provides an overall look at the design and functions of the main screen elements of the Patient Registration GUI interface.

2.1 Patient Registration GUI Windows Overview

This section reviews the main windows with the Patient Registration GUI application.

2.1.1 Initial Status of the GUI Window

After logging on to the Patient Education GUI application, the RPMS Registration window displays. This window displays the name of the logon user and the initial division.



Figure 2-1: Sample initial GUI window

The Patient Registration GUI interface uses the “ribbon” concept that contains commands and other menu items that were previously on menus and toolbars.

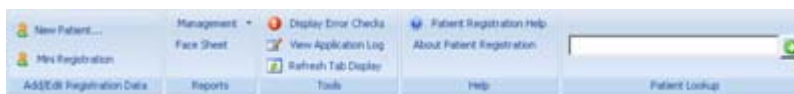


Figure 2-2: Sample Patient Registration GUI ribbon

2.1.2 Patient Lookup

Use the Patient Lookup function to search the RPMS database for a patient. See Section 3.1 Patient Lookup for more information. The selected patient populates the Patient Workspace and becomes the current patient.

2.1.3 Patient Workspace

The Patient Workspace displays the most recently accessed patients.

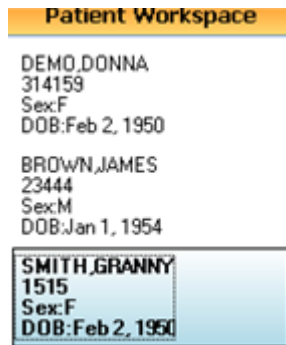


Figure 2-3: Sample Patient Workspace

The sample Patient Workspace illustration shows three patients. The current patient is the one with a different colored background.

You can do the following in the workspace:

- Edit patient data by clicking on the patient name.
- Remove a patient either by clicking the Close button on the Patient Banner or by selecting the patient name in the Patient Workspace and then selecting the “Close Patient” option on the context menu.
- Limit the list to seven patients. If you try to access more than the limit, the system will prompt you to close one or more of patients.

2.1.4 Add/Edit Registration Data

Use the Add/Edit Registration Data function to add a new patient.

- Use the New Patient function to enter the required patient data about a new patient. See Section 4.0 New Patient for more information.
- Use the Mini Registration function to enter only vital patient data about a new patient (used in emergency cases). See Section 4.2 Mini Registration for more information.

2.1.5 Reports

Use the Reports function to view Management and Face Sheet reports. The Management reports include Community Report, Daily Report, Dup Pat Report. See Section 6.0 Reports for more information.

2.1.6 Tools

Use the Tools function to display error checks (requires an open patient record that has errors) and to refresh the tab display.

Use the View Application log option to report a problem to the Help Desk. This log helps the development team determine what the problem is.

2.1.7 Help

Use the Help function to access the online help system for the Patient Registration GUI application and to view information about the application (such as its version number).

2.2 Key Patient Registration GUI Concepts

The Patient Registration GUI application is representing a GUI to the Patient Registration module in the RPMS database.

Both the roll-and-scroll and the GUI will be operating (in parallel) so that various users are able to utilize both ways of data entry of patient registration data. This means the patient registration data can be entered and updated utilizing two different modes.

Much effort has been expended to avoid duplicate records in the database. In this respect, the user can scan the database for a patient (when entering a new patient, for example). In addition, the application has various checks that are performed during the new patient data entry session; these checks look for duplicate patient data.

All users are reminded that many of the reports generated by this package contain confidential patient information that is protected by the Privacy Act.

This package does not impose any additional legal requirements on the user, nor does it relieve the use of any legal requirements. Names and social security numbers used in the examples are fictitious.

This package requires the user to have access and verify codes to login to the system. These can be obtained from your supervisor or site manager. In addition, security keys are assigned with your access codes. They are required to perform certain options in the Patient Registration application. Some options within the application are “locked,” i.e., the user is unable to access the option without the appropriate security key.

3.0 Using Patient Registration GUI Features

Several Patient Registration GUI features are made available across multiple windows within the application.

3.1 Patient Lookup

Use the Patient Lookup field to search for patient, using the patient name, Health Record Number (HRN), Social Security Number (SSN), Date of Birth (DOB), or alias.

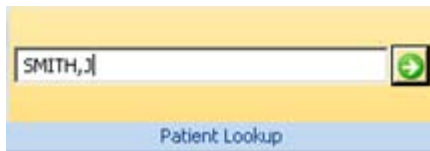


Figure 3-1: Patient Lookup field

The application stores the patient name like DUCK,DONALD (no space after the comma).

If you are using the patient name, use at least three characters of the last name in the search.

If you are using the alias, use at least characters of the alias.

If you are using the HRN or SSN, you need to use all of the characters (not a shortened version).

After the Patient Lookup field is complete, click the green arrow at the end of the field.

The application determines if the patient can be found in the system.

If no matches are found, the application displays the RPMS Patient Registration warning that states: No matching patients were found. Click OK to dismiss the warning. The application then displays the Quick Patient Search dialog box. Here you can try another search.

If there are one or more matches, the application displays the Quick Patient Search window. This window will (also) contain any aliases for the name in the search.

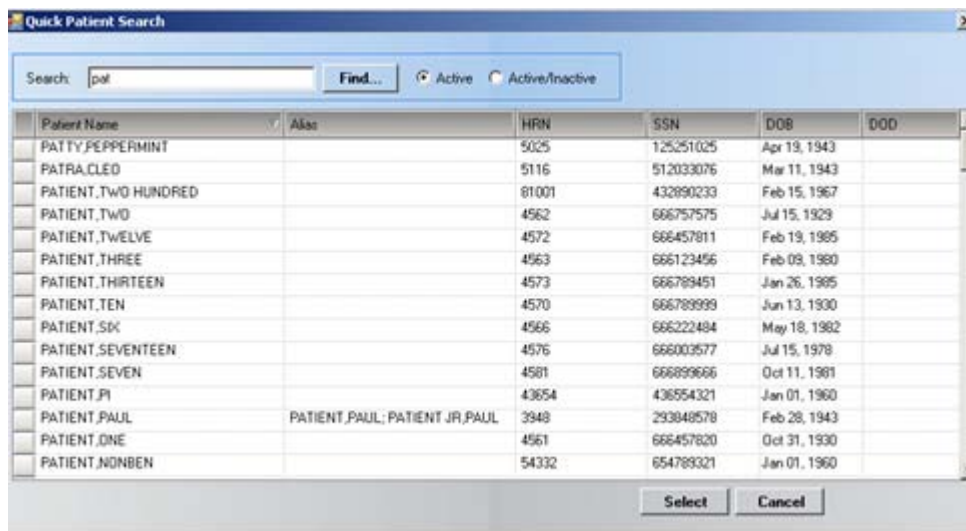


Figure 3-2: Sample Quick Patient Search window

Use the scroll bar to the right to scroll through the records to search for the patient name.

In addition, you can display the active and inactive names associated with the search criteria. The default is Active (only).

Otherwise, use the Search field to enter another search criterion.

Highlight the patient name you want to use and then click Select (otherwise, click Cancel). The Select function causes two things to occur:

1. The patient name will appear in the Patient Workspace.
2. The application will display the patient's registration data that you can edit. See Section 5.0 Updating Patient Data for more information.

3.2 Working with Columns

This section reviews how you can customize the view by manipulating the columns in a grid:

- Sorting
- Changing column width
- Moving columns

3.2.1 Sorting

Click the column heading to display the sort icon on the right side of the column.



Figure 3-3: Sample column showing sort icon

If you click the column heading again, the sort will be in the opposite direction.

3.2.2 Changing Column Width

Modify the column widths by dragging either of column's left or right borders.

To change the default column width, do the following:

1. Move the pointer over either the left or right edge of the column's header. The arrow will change into an icon.



Figure 3-4: Icon for Moving Column's Edge

2. Click and drag this icon to the left or right to resize the column's width in that direction; release your mouse when you reach the desired new width.
3. The other columns will adjust to the new view of the columns.

3.2.3 Moving Columns

Move a column from one position to another position by the drag-and-drop method, using your mouse. As you move from one place to another, a pair of red indicator arrows display above and below the column header row at that point.



Figure 3-5: Red Arrows as You Move the Column

Release your mouse when you have the selected column in the new position.

3.2.4 Filtering

Filtering is a means by which you can display a subset of the current set of data. You can use the filters on more than one column.

Click a column's Filter icon (∇) to display the options for that column from which to choose. The options include each of the values found in that column, as well as [All], [Custom], [Blanks], and [NonBlanks].



Figure 3-6: Sample Filter Drop-Down List

3.2.4.1 Creating a Filter

Select (Custom) from the drop-down list to display the Enter Filter Criteria for Last Updated dialog box for the column. Using the custom filter allows you to filter using multiple criteria for the column.

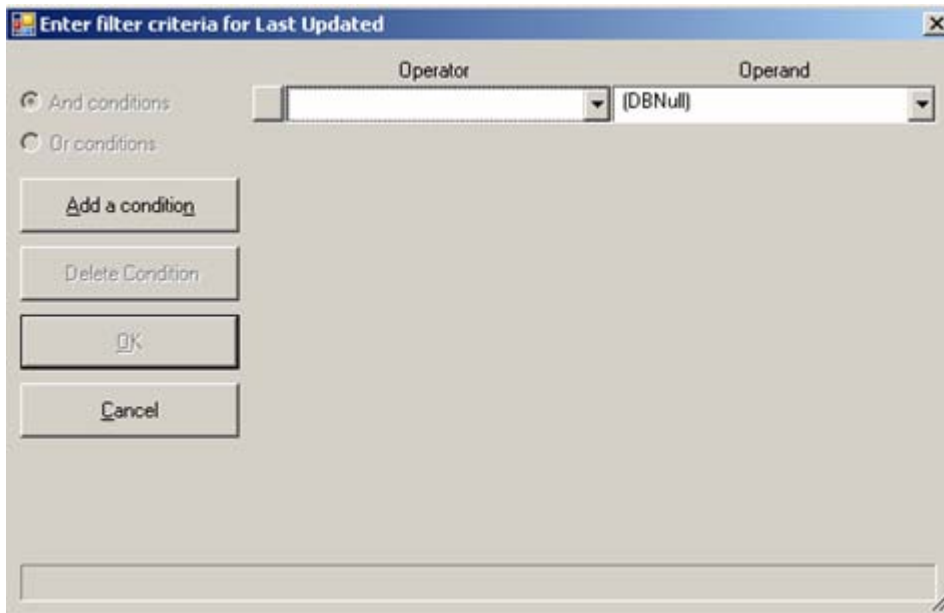


Figure 3-7: Sample Filter Criteria Dialog

You will create the filter criteria statement on this dialog, using these guidelines.

The Operator and Operand fields make up the condition for the statement.

Click the drop-down list for the Operator field to select the correct operator. These operators vary according to the column selected.



Figure 3-8: Sample of Operators

After selecting the correct operator, click the drop-down list for the Operand field (the operand is a value for the column you want to filter). Select the appropriate operand or type the value you want to use as a filter (the value does not need to be on the drop-down list).

If you need a second condition, click the Add a Condition button to add another row to the filter criteria statement. After selecting an operator (for the second condition), the And Conditions and Or Conditions radio buttons become active.

- **AND** = Returns TRUE if all its arguments are TRUE; returns FALSE if one or more arguments are FALSE. This means that a record will be returned only if all the AND statements are true.
- **OR** = Returns TRUE if any argument is TRUE; returns FALSE if all arguments are FALSE. This means that a record will be returned if any of the OR statements are true.

If you need to remove one of the criteria statements, click the left-most box (of the row) to select it and click the Delete Condition button.

When the filter criteria statement is complete, click OK. (Otherwise, click Cancel to dismiss the dialog box.)

The rows displayed will be limited to those that match the conditions in your statement.

The column's Filter icon changes color (▼). This color change happens even if there was no apparent change to the rows displayed, because all records matched the specified conditions.

EXAMPLE: Assume you want the patients born between two dates. You would filter based on the values in the DOB column (the Operand). The dialog box could look like the following:

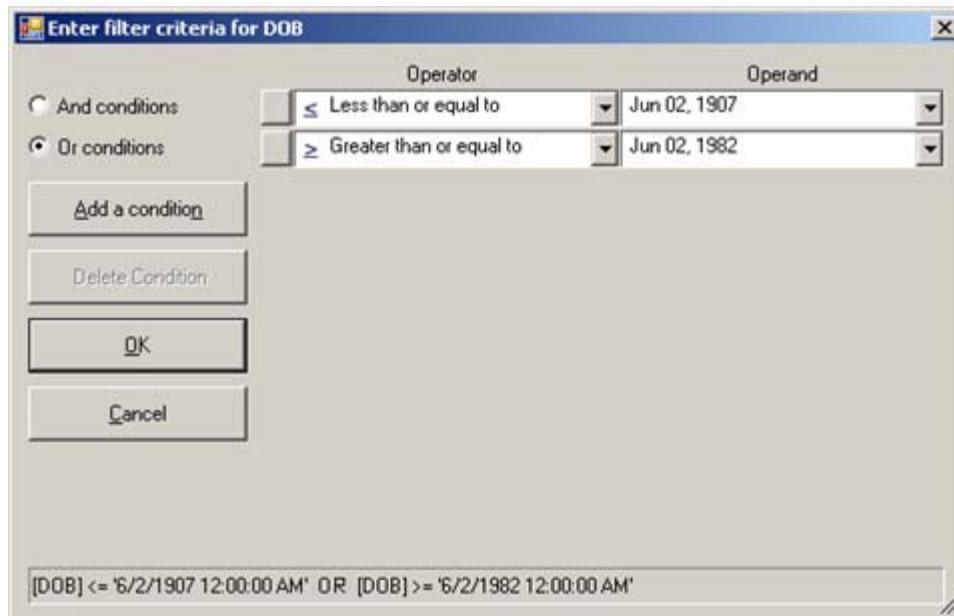


Figure 3-9: Sample of Filter dialog box

3.2.4.2 Returning to All Rows

Generally you use this action after you have filtered the column. Click the Filter icon and select [All] from the drop-down list. The Filter icon changes to its original color (☑) and all rows are restored to the display.

Note: If you wish to filter based on values in more than one column, use the custom feature and specify all the conditions at once. If you filter the columns separately, you will need to select [All] from the drop-down lists on each filtered column to restore all rows.

3.2.4.3 Other Filter Choices

If you want to view all the rows where the value is blank for a particular column, select [Blanks] from that column's filter drop-down list.

If you want to view all the rows that are not blank for a column, select [NonBlanks] from the filter drop-down list.

3.3 Entering Data

The following information covers entering data in free text and date fields, using drop-down lists, and recognizing missing data.

3.3.1 Free-Text Fields

Free-text fields are those fields that you can type information into (they do not have drop lists).

An example of the free-text field is the City field (when creating/editing the patient's address).

The free-text field has a right-click menu to aid in editing the text.



Figure 3-10: Right-click menu to aid in editing text

These options operate just like those in any Windows application. Here are the meanings of the options:

- Undo: removes the last edit action in data input.
- Cut: removes the selected text from its current position and places it on the clipboard.
- Copy: copies the selected text and places it on the clipboard (the text is *not* removed).
- Paste: copies the contents of the clipboard and places it in the field at the current cursor position.
- Delete: removes the selected text from its current position.
- Select All: highlights all of the text in the current field.

Note: If you have a long free-text field (like the Location of Home field), you could type the contents of the field in a word processing application. Here you can check the spelling and view the entire text string. Then copy the text string in the word processing application and paste it in the Patient Registration GUI free-text field.

3.3.2 Drop-Down Lists

You can populate a field by selecting an option from the drop-down list for the field. This type of field does not allow you to populate the field by manually typing. In most cases, the first option on the drop-down list is a “blank” so that you can make the field empty. The following shows the options on the Eligibility Status field. Notice that the first option is blank.

CHS & DIRECT
 DIRECT ONLY
 INELIGIBLE
 PENDING VERIFICATION

Figure 3-11: Example of options on a drop-down list

3.3.3 Date Fields

Each date field has a calendar associated with it *or* you can manually enter the date.

3.3.3.1 Manual Entry

You can manually enter dates in any of the following formats:

- 3/28/2004
- 03282004
- 3-28-2004
- 3.28.2004

The application automatically formats the date as MM/DD/YYYY despite how you entered the date.

3.3.3.2 Calendar Entry

Click the date field's drop-down list to display the calendar. The default selected date is today's date.



Figure 3-12: Sample calendar

The highlighted date will populate the particular date field.

If you select another date, say one month earlier, and this is not the date you want, you can click the Today label at the bottom of the calendar to populate the date field with the current date.

3.3.3.2.1 *Changing the Month*

You can select from another month's dates by clicking the appropriate arrow button (more than once, if needed).

If you click on the month label, the application displays a list of all of the months.



Figure 3-13: List of Months to Select

Here you can select another month. The calendar for the “new” month will display.

3.3.3.2.2 *Changing the Year*

If you click on the year label, the application displays up and down arrow buttons that you can click to change the year.



Figure 3-14: Changing the Year

3.3.4 Missing Data

If there is any missing data that is required, you will receive a prompt with a missing data icon (🚫) next to the field. Below is an example of a field that has missing data.



Figure 3-15: Sample field with missing data

You must correct the missing data in order to save the data.

3.4 Pop-Up Functionality

There are several places in the application when you will be viewing a pop-up window. For example, if you select the Face Sheet button in the Reports area, the application displays the Face Sheet pop-up window.

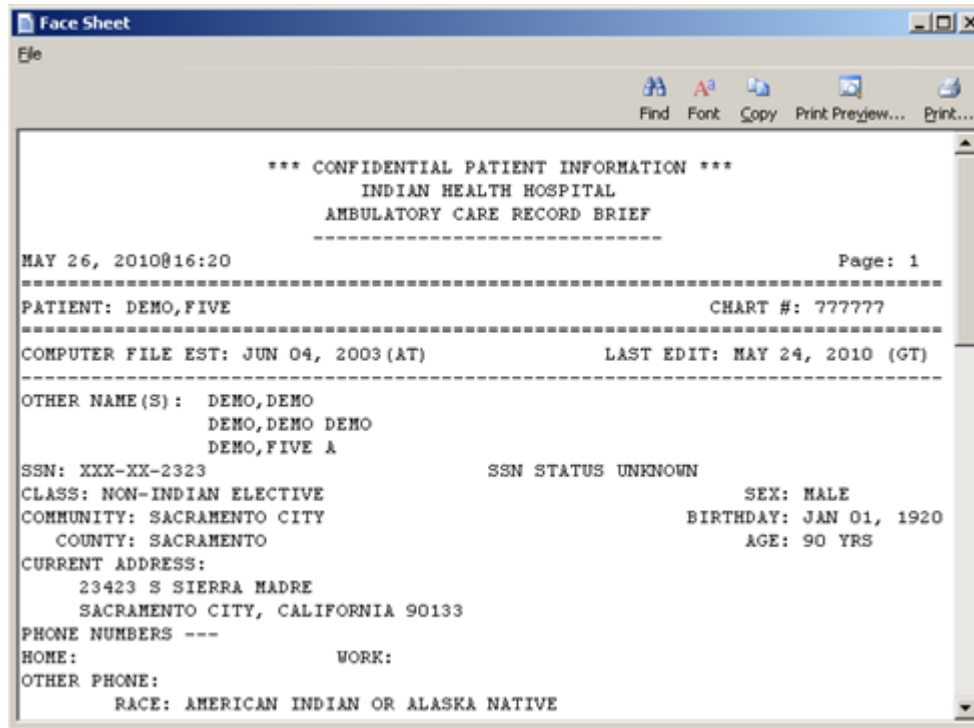



Figure 3-16: Sample Face Sheet pop-up

You can navigate through the information by using the scroll bar to the right.

3.4.1 Find

Use the Find function to search for data in the pop-up. Click the Find  button to access the Search dialog box.

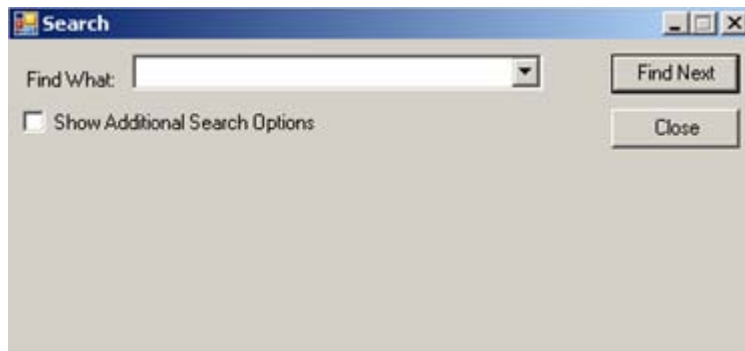


Figure 3-17: Sample Search dialog box

If you *do not* select the Show Additional Search Options check box, the search looks in the entire pop-up window for a match.

If you select the Show Additional Search Options check box, the Search dialog box changes to show more options for the search.

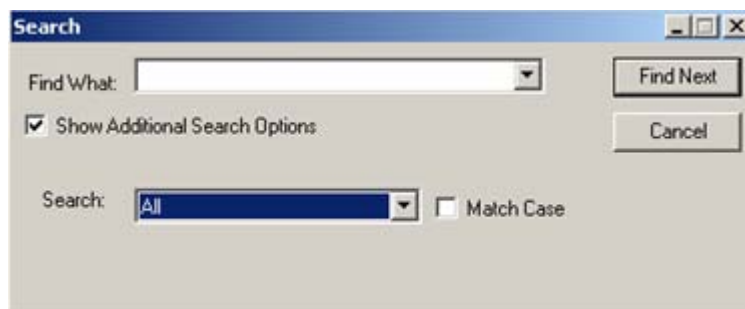


Figure 3-18: Search dialog box with additional search options

Click the drop-down list for the Search field to view the options for that field. The highlighted option determines the direction of the search.



Figure 3-19: Sample drop-down list options for Search field


If you select the Match Case check box, it will cause the search to match the case of the text in the Find What field.

After all fields are populated, click Find Next (otherwise, click Cancel). The Find Next function searches the pop-up window for a match.

If a match is found, the matching text will be highlighted (in the pop-up window). To find the next occurrence of the text, click Find Next again.

If a match is not found, the Text Search Results message displays: “No other occurrences of ‘skeleton’ were found.” (The word skeleton was the search criteria.) Click OK to close the message and to return to the Search dialog box.

3.4.2 Font

Use the Font function to determine the font, size, and other features of the text. Click the Font button () to display the Font window.

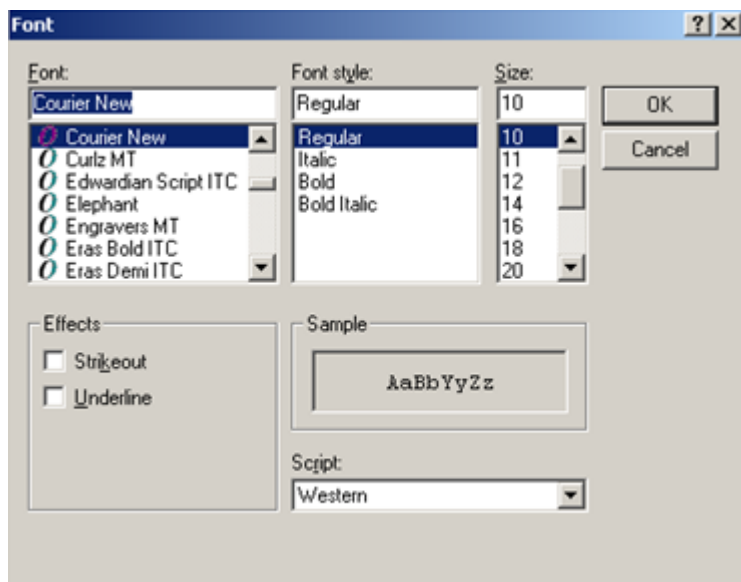


Figure 3-20: Font window


Here you can change the Font name, style, and size of the text in the pop-up window (applies to all of the text). In addition, you can add effects like strikeout and underline—these perform like those effects indicated in Microsoft Word. As you highlight a font name, a sample of the text will display in the Sample field.

Change the Script option if you need to see the text displayed in another language and you have that language pack installed on your machine. If the language pack is not installed, the display will not change by selecting another script.

Click OK to apply your changes to the text in the current pop-up window. These changes are only effective for the current view of the pop-up window. (Otherwise, click Cancel.)


3.4.3 Copy



Click the Copy button () to copy the selected text to the Windows clipboard.


3.4.4 Print Preview



Click the Print Preview button () to view the Print Preview dialog box. You can print the contents of the pop-up window from this dialog box.

3.4.5 Print



Click the Print button () to display a print dialog where you specify the printer to output the contents of the pop-up window, the page range, and number of copies.

3.4.6 File Menu

The File menu contains the print actions (like the Print Preview and Print buttons), the Page Setup function, the find and copy functions, as well as a Close function (dismisses the pop-up). See Section 4.5.5 Print for more information on the print actions. The Find and Copy functions are discussed above.

3.5 Table Lookup

The “Magnifying Glass” icon next to the field means you can search for a particular record in the Table Lookup dialog box by clicking the icon. In addition, you can clear the information in the particular field (on the form).

3.5.1 Searching for Data

Use the Search field of the Table Lookup dialog box to enter the criteria for the search.

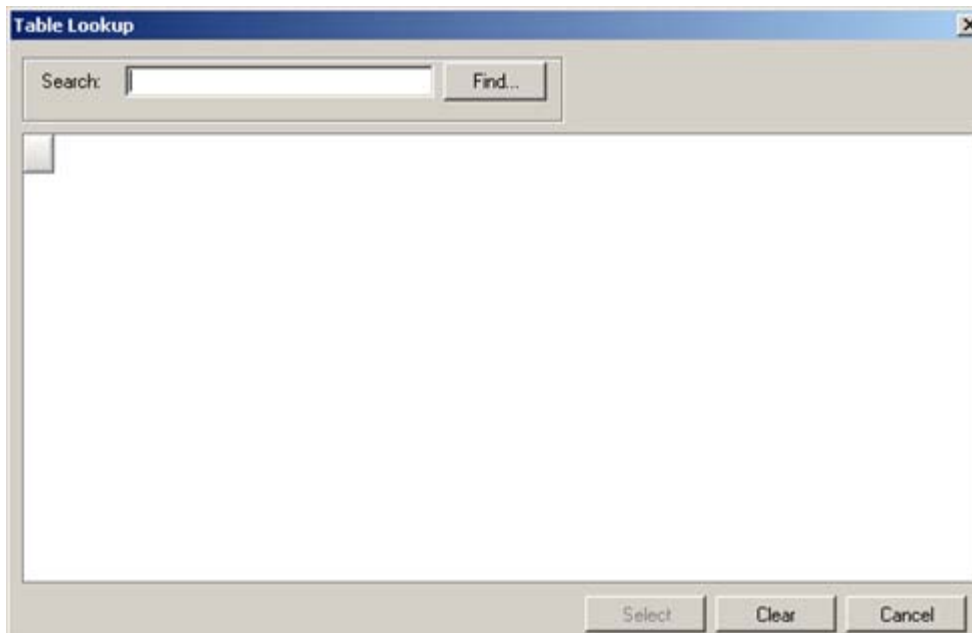


Figure 3-21: Table Lookup dialog box

To search for a name, for example, type a few characters (minimum is three) in the Search field and then click Find. The retrieved records will display in the bottom area (if any).

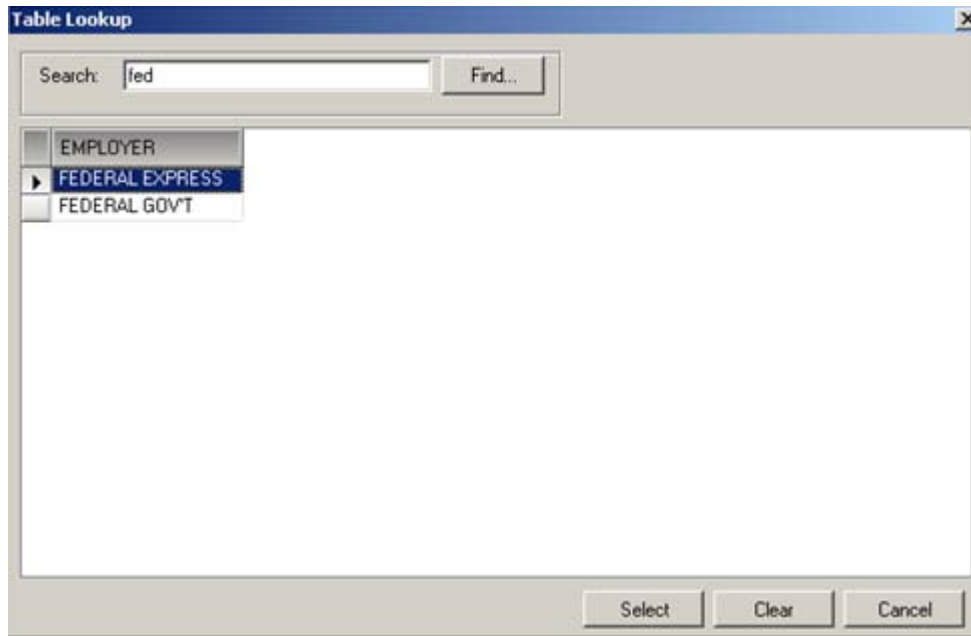


Figure 3-22: Sample retrieval of records

Select a (retrieved) record and click Select. This will close the dialog and populate the field (on the form) with the selected record. (Otherwise, to exit the Table Lookup dialog box, click Cancel.)

3.5.2 Clearing Data in Field with Magnifying Glass Icon

To clear the data in a field with the magnifying glass icon (on a form), click the icon to display the Table Lookup dialog box. Click Clear (on Table Lookup). This will close the Table Lookup dialog box and clear the data in the field on the form. (To exit the Table Lookup dialog box without clearing the data, click Cancel.)

3.6 Using Options on Menu for Application Icon

Left-click on the application icon to access the options available for various processes.



Figure 3-23: Options on menu

3.6.1 Sign on to other RPMS Server/User

This option allows you to sign onto another server. After selecting this option, the application displays the RPMS Patient Registration Login dialog box.



Figure 3-24: RPMS Patient Registration Login dialog box

This is the same dialog box you use to login to Patient Registration GUI application when you double-click the shortcut on your desktop.

Below are the fields:

RPMS Server

This is the name of the server where you want to login. Use the option “<Click to edit connection>” on the drop-down list. The application displays the RPMS Server Connection Management dialog box.

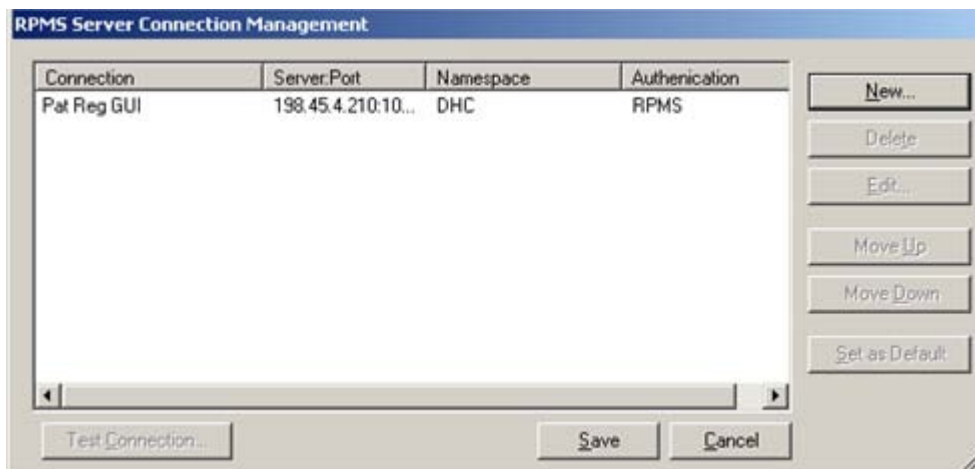


Figure 3-25: RPMS Server Connection Management dialog box

If one of the rows in the grid is what you want to use, highlight it. This action activates the Test Connection button; click this button to test the connection to the particular server. After using the Test Connection button, the application displays the Test Login dialog box (where you can login to that particular server; you will need to know the Access and Verify Codes for that server).

If you want to establish a new server connection, click New. This action displays the Edit RPMS Server Connection dialog box.

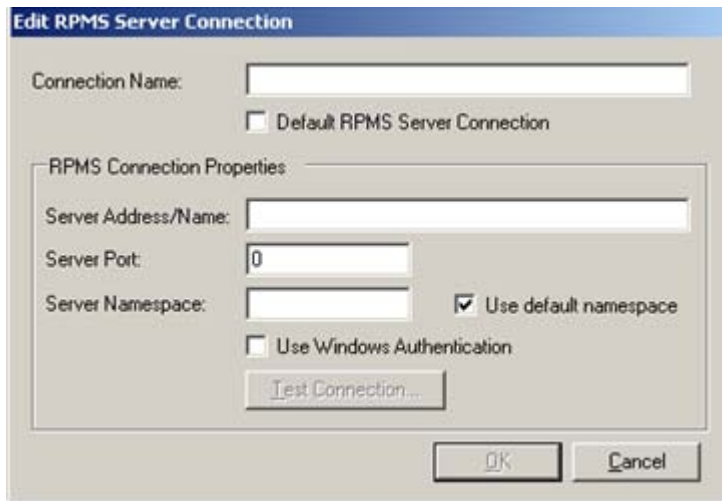


Figure 3-26: Sample Edit RPMS Server Connection dialog box

Use the Edit RPMS Server Connection dialog box to establish the new server connection.

The Connection Name can be anything you want to name the new connection.

The Server Address Name, Server Port, and Server Namespace are necessary to establish the new connection (these must exist in order to make this process work).

After populating the fields on this dialog box, you can test the connection by clicking Test Connection.

After this dialog box is complete, click OK to establish the new connection (otherwise, click Cancel to not establish the connection).

The following fields apply to the remaining fields on the RPMS Patient Registration Login dialog box. These same fields will appear on any login dialog box.



Figure 3-27: RPMS Patient Registration Login dialog box

Access Code

Populate this field with the access code to the particular server.

Verify Code

Populate this field with the verify code to the particular server.

Use Windows Authentication

Use this checkbox to automatically sign into the system based on your windows credentials. Some sites use it; some do not.

After the dialog box is complete, click OK to sign onto the particular server (otherwise, click Cancel).

3.6.2 Change RPMS Division

This option applies to a site that uses more than one RPMS database. Select the Change RPMS Division option to display the Set Initial Division dialog box.

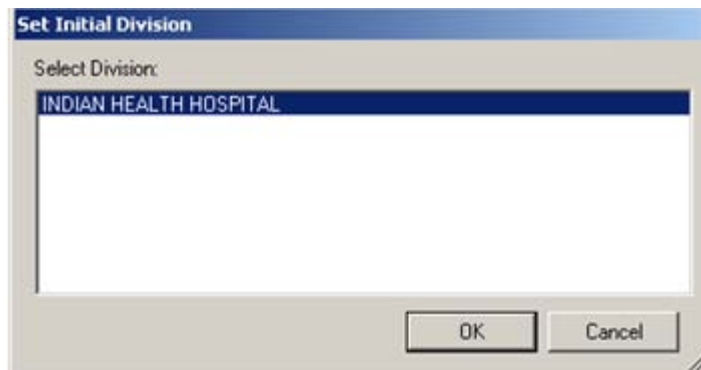


Figure 3-28: Sample Set Initial Division dialog box

The available divisions are listed in the field. Select a division and click OK to set the initial division (otherwise, click Cancel).

3.6.3 Recent Patients

You can view the recently used patients by highlighting the Recent Patients option.

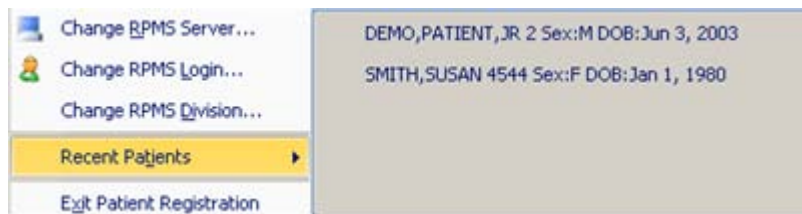


Figure 3-29: Sample Recent Patients option

3.6.4 Exit the Application

You can exit the Patient Registration GUI application two ways: by clicking the close button on the upper right of the GUI window, or by selecting the Exit Patient Registration option on the menu when you left-click on the application's icon.

3.7 Using the Errors/Warnings Found

When editing patient data, you can view what errors or warnings that the application found about the patient data by clicking Display Error Checks.



Figure 3-30: Display Error Checks button

Clicking Display Error Checks to access the errors/warnings found dialog box.

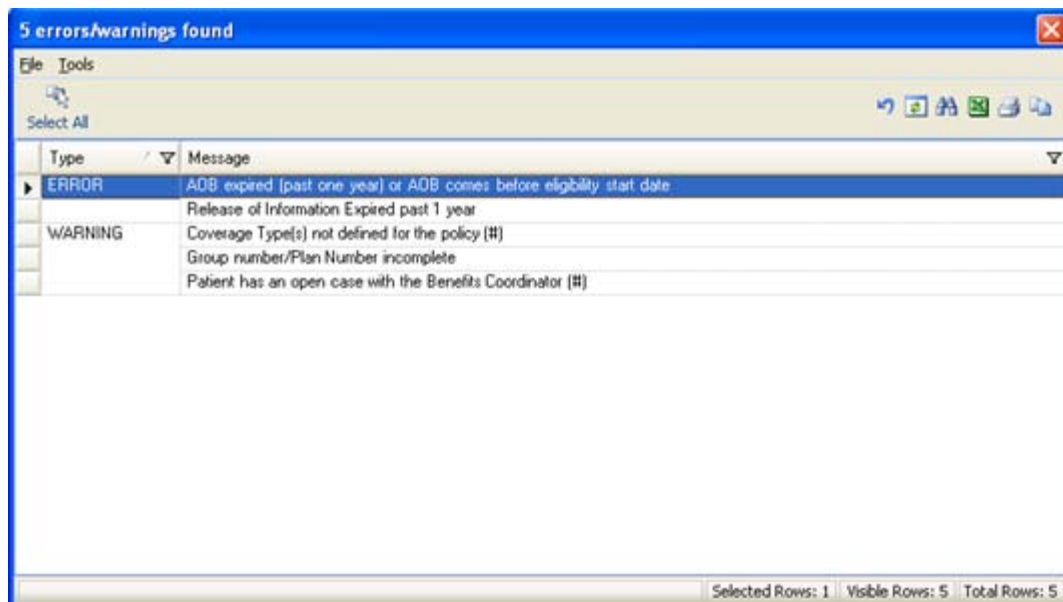


Figure 3-31: Sample errors/warnings found

The grid displays the errors/warnings about the current patient data.

You can customize the view by manipulating the columns in a grid. See Section 3.2 Working with Columns for more information.

3.7.1 Buttons on Toolbar of Warnings/Errors

The Select All button selects all the records in the grid.


The buttons on the right side of the window provide various functions that affect the selected rows in the grid.




Figure 3-32: Buttons on right side of window

The application provides hover text for each button.


3.7.1.1 Reset View

Click the Reset View button () (or select Tools | Reset View) to return the current view to the default view. You use this feature when you change the view, such as resize the column width. This is the same as pressing Ctrl+R.

3.7.1.2 Refresh

Click the Refresh button () (or select Tools | Refresh) to update any RPMS field values on the current window with new data from the server. This is the same as pressing F5 ard.

3.7.1.3 Search

Search for data in the current grid by clicking the Search button () (or by selecting Tools | Search or pressing Ctrl+F) to display the Search dialog box.

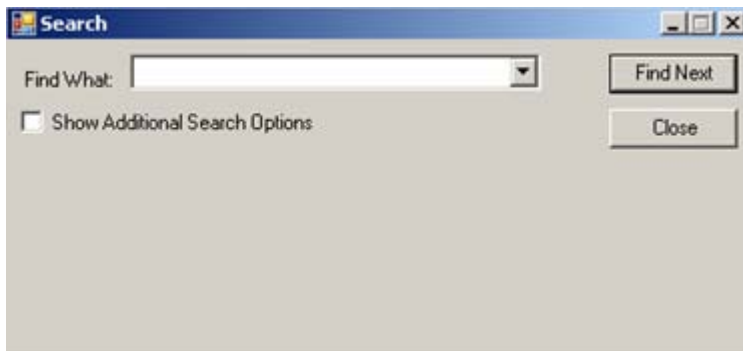


Figure 3-33: Search dialog box

If you *do not* select the Show Additional Search Options check box, the search looks in all columns (in the grid) for a match.

If you select the Show Additional Search Options check box, the Search dialog box changes to show more options for the search.

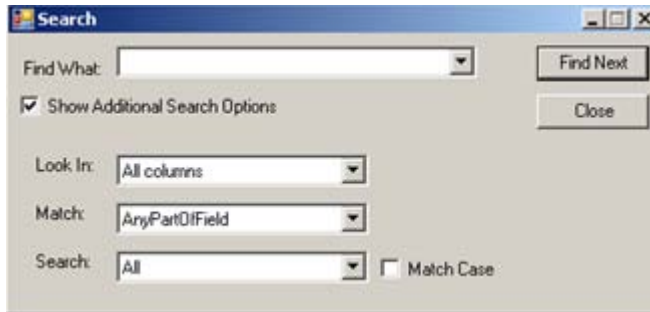


Figure 3-34: Search dialog box with additional search options

Type the text of the search criteria in the “Find What” field. The remaining fields determine the other features for the search.

- Select the “Match Case” check box to search for a case match of the search criteria (text in the Find What field).
- Use the options in the Look In field drop-down list to determine what part of the window to search, for example, all columns.
- Use the options in the Match field to determine what part of the Find What field will be matched in the search
- Use the options on the Search field to determine the direction of the search.

After all fields are populated, click Find Next. (Otherwise, click Cancel to dismiss the Search dialog box.)


If a match is found, the matching text will be highlighted (in the grid). If you want to continue the same search, click Find Next again; repeat this process as needed.

If a match is not found, the Datagrid Search Results message displays. Click OK to close the message and to return to the Search dialog box.



Figure 3-35: Sample datagrid search results

3.7.1.4 Export to Excel

Use the Export to Excel button () (or select Tools | Export to Excel or press Ctrl+E) to export the information in the selected rows in the grid to Excel.

The application displays the warning message about the export.

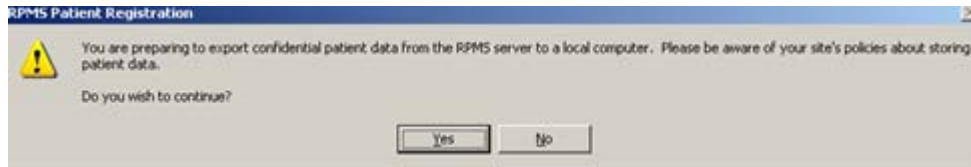


Figure 3-36: Warning message about exporting the information

Click No to dismiss the warning and to exit the export process.

Click Yes to continue the export process and to display the Save As dialog box.

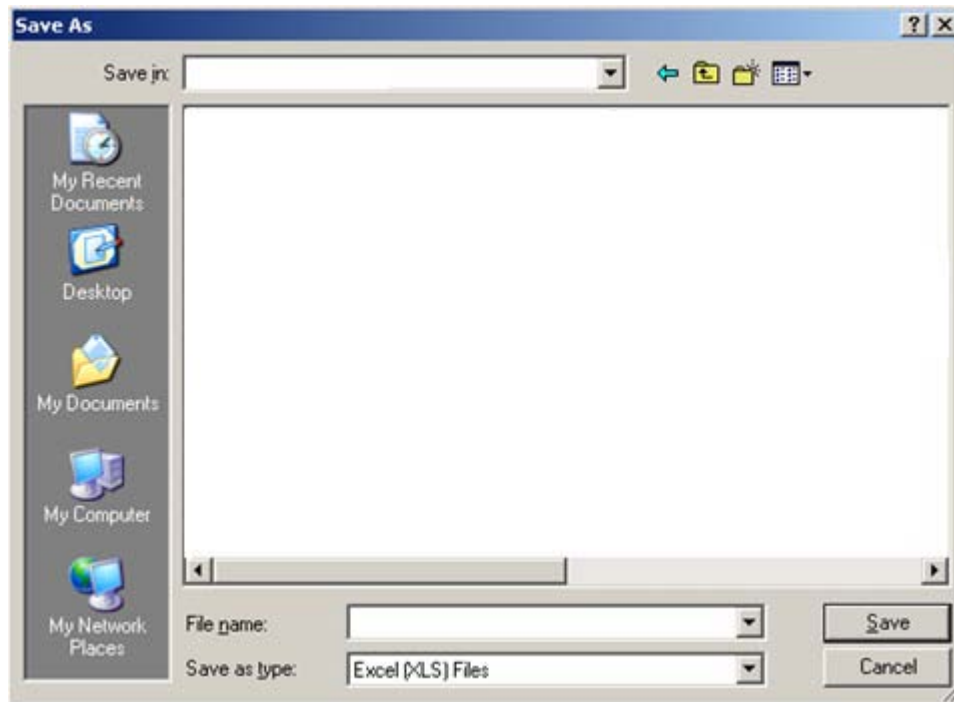


Figure 3-37: Sample Save As dialog box

Make sure the location where you want to save the file displays in the Save In field.

Type the name in the File Name field. The system will automatically add XLS as the extension to the field name.

Click Save. (Otherwise, click Cancel.). After clicking Save, the Export Panel message "Excel export has been created" displays when the Save command is complete; click OK to dismiss the message.

When you view the Excel document, the application provides a Confidential Patient Information header in the document.

3.7.1.5 Print

You can print the selected rows in the grid by clicking the Print button (🖨️) (or by selecting Tools | Print or pressing Ctrl+P) to display the Print Preview dialog box.

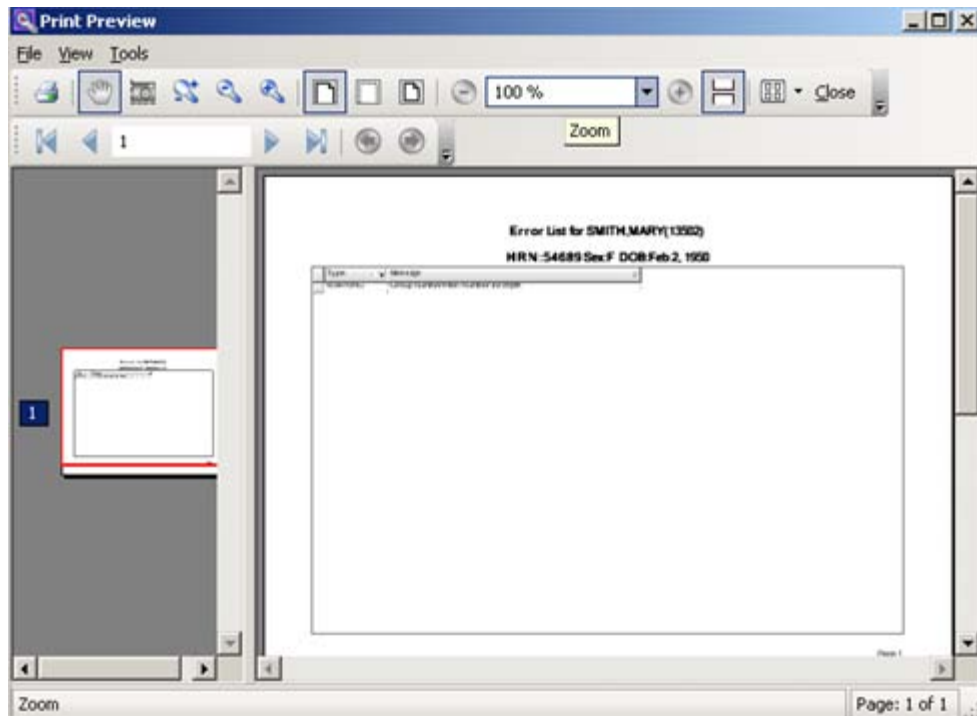


Figure 3-38: Sample Print Preview dialog box

Select File | Print or click the Print button (on the Print Preview dialog box) to output the data.

3.7.1.6 Copy to Clipboard

You can copy the selected rows in the grid to the Windows clipboard by clicking the Copy to Clipboard button (📄) (or by selecting Tools | Copy Rows to Clipboard or by pressing Ctrl+Shift+C). You can paste the contents of the Windows clipboard to any Windows application.

3.7.2 Menu Options on Warnings/Errors

The options on the File and Tools menus are discussed below.

3.7.2.1 File Menu

The options on the File menu are:

- **Page Setup:** This option displays the Page Setup dialog box. This dialog box operates like the one in Windows.

- Print Preview: This option displays the print preview dialog box. This dialog box operates like the one in Windows.
- Print: This option displays the print preview dialog box. This dialog box operates like the one in Windows.

3.7.2.2 Tools Menu

The options on the Tools menu operate like the buttons on the right side of the window.

3.8 Edit Private Insurance Window

Use the Edit Private Insurance window to establish new private insurance information for the patient.

Figure 3-39: Sample Edit Private Insurance window

The Edit Private Insurance window is divided into these areas: Select Policy Holder, Policy Holder Information, Insurer Information, and Policy Members.

3.8.1 Select Policy Holder Area

Use the Select Policy Holder area to establish the policy holder for the private insurance.

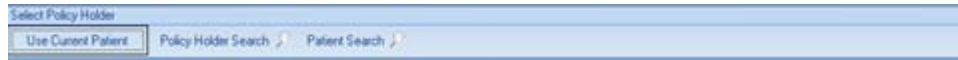


Figure 3-40: Select Policy Holder area

3.8.1.1 Use Current Patient Button

If you want to use the current patient as the policy holder, click Use Current Patient. The patient data populates the fields in the Policy Holder Information area of the Edit Private Insurance window.

3.8.1.2 Policy Holder Search Button

If you want to search for a policy holder, click Policy Holder Search. The application displays the Scan for Match Policy Holder window. The search only works if there are policy holders that exist in the database for the application.

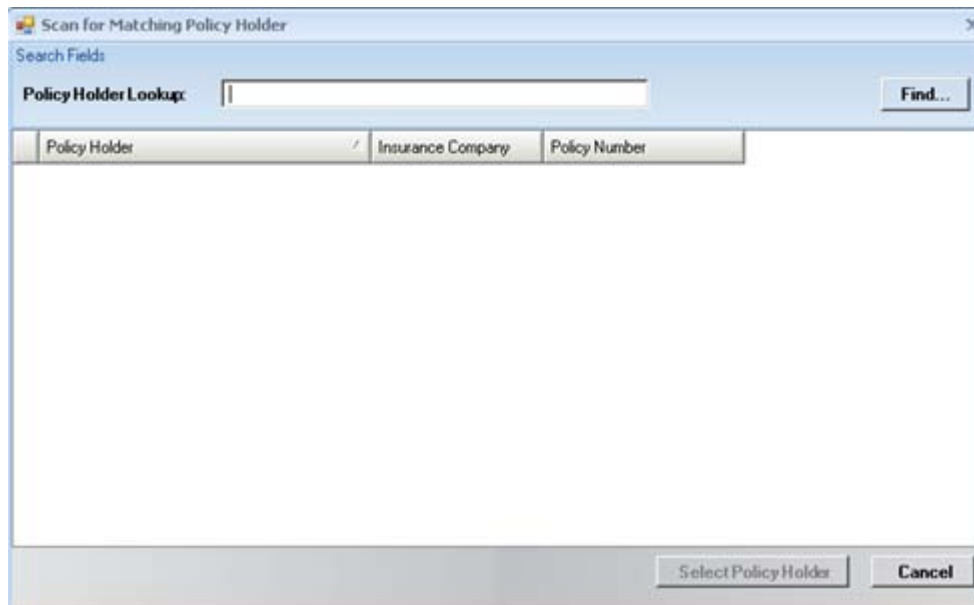


Figure 3-41: Scan for Matching Policy Holder dialog box

Populate the Patient Lookup field with the first few characters (minimum of three) of the policy holder's last name and then click Find.

The application displays the retrieved records in the grid.

To use one of the retrieved records, highlight it and then click Select Policy Holder (otherwise, click Cancel).

If you clicked Select Policy Holder, the policy holder's data populates the fields in the Policy Holder Information area of the Edit Private Insurance window.

3.8.1.3 Patient Search Button

Click Patient Search to access the Scan for Matching Patients dialog box where you can search for a patient.

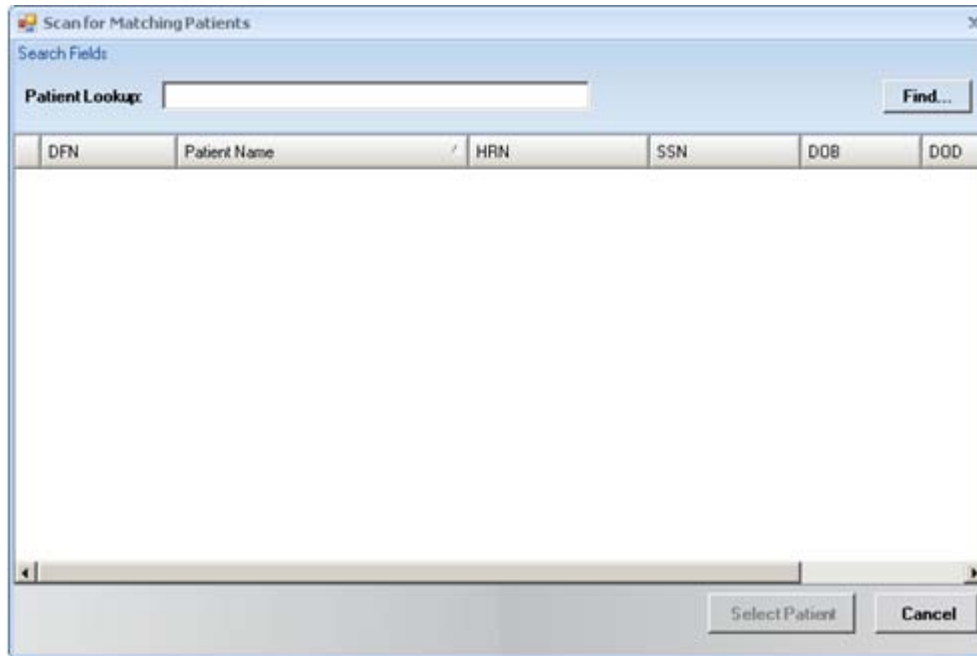


Figure 3-42: Scan for Matching Patients dialog box

Populate the Patient Lookup field with one of the following: (1) first few characters (minimum of three) of the patient's last name, (2) the patient's DOB, or (3) the patient's SSN. Then click Find. The application searches the database and across all divisions.

The application displays the records retrieved in the search in the grid.

To use one of the retrieved records, highlight it and then click Select Patient (otherwise, click Cancel).

If you clicked Select Patient, the patient data populates the fields in the Policy Holder Information area of the Edit Private Insurance window.

3.8.2 Policy Holder Information Area

The Policy Holder Information area provides information about the policy holder. Some of the fields are populated if you used any of the buttons in the Select Policy Holder area of the Edit Private Insurance window.

Figure 3-43: Sample Policy Holder Information area

The required fields have the asterisk (*) following their names.

Policy Holder

Populate with the policy holder's name in the format: Last Name, First Name, Middle, e.g., DUCK,DAFFY.

Relationship to Insured

This is the relationship of the insured to the policy holder. Select one of the options from the drop-down list.

Policy or SSN

Populate with the policy number or with the policy holder's Social Security Number, using 3 to 20 characters.

Address–Street

Populate with the policy holder's street address, using 3 to 20 characters.

Date of Birth

This is the policy holder's DOB. Manually enter or click the drop-down list and select a date from the calendar.

Gender

Populate with the policy holder's gender by selecting an option from the drop-down list: Male or Female.

City

Populate with the policy holder's city of residence, using 3 to 20 characters.

State

This is the policy holder's state of residence. Use any option from the drop-down list that contains all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, and then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Zip Code

This is the zip code of the policy holder's residence. This field will accept up to 10 digits.

Phone

This is the policy holder's home phone number. This is a free text field that accepts numeric digits, using 4 to 20 characters. Be sure to include the area code.

Effective Date

This is the effective date for the private insurance. Manually enter or click the drop-down list and select a date from the calendar.

Expiration Date

This is the expiration date of the private insurance, if any. Manually enter or click the drop-down list and select a date from the calendar.

Card Name

This is the name of the policy holder, as it will appear on the insurance card.

Member Number

This is the member number of the policy holder, if any.

Employment Status

This is the policy holder's employment status. Select an option from the drop-down list.

Employer

This is the policy holder's employer. Click the magnifying glass icon to access the Table Lookup window where you search for the name of the employer. See Section 3.5 Table Lookup for more information about using this window. Remember you can use this window to remove the current name in this field.

Person Code

Populate with the policy holder's person code, using 2 to 10 characters. This code is used to uniquely identify each family member.

Primary Care Provider

Populate with the patient's primary care provider for the patient's plan. This is usually required for HMO/Managed Care plans.

3.8.3 Insurer Information Area

The Insurer Information area provides information about the insurer, such as coverage type, information about the insurance card, etc.

Figure 3-44: Sample Insurer Information area

The insurer name and address is shown in this area (left side).

Below are the fields in the Insurer Information area.

Group Name

Use the Group Name field to establish the group name, if any. Click the magnifying glass icon to access the Table Lookup window where you search for the group name. See section 3.5 Table Lookup for more information about using this window. Remember you can use this window to remove the current name in this field.

Coverage Type

Use an option from the drop-down list to populate this field, for example, HMO.

Card Copy on File

Check this check box if a copy of the insurance card is on file. If you check this field, make sure to populate the Date Obtained field.

Date Obtained

Populate with the date the copy of the insurance card was on file. If the date is Today, click Today to populate this field.

3.8.4 Policy Members Area

Use the Policy Members area to establish the members of the insurance policy.



Members	Person Code	Member Number	Relationship	HRN	Elig. Date	Elig. End Date
800P8117			AUNT	1506		

Figure 3-45: Sample Policy Members area

3.8.4.1 Add

Click Add (or press F2) to add new policy member. The application displays the Policy Members dialog box.

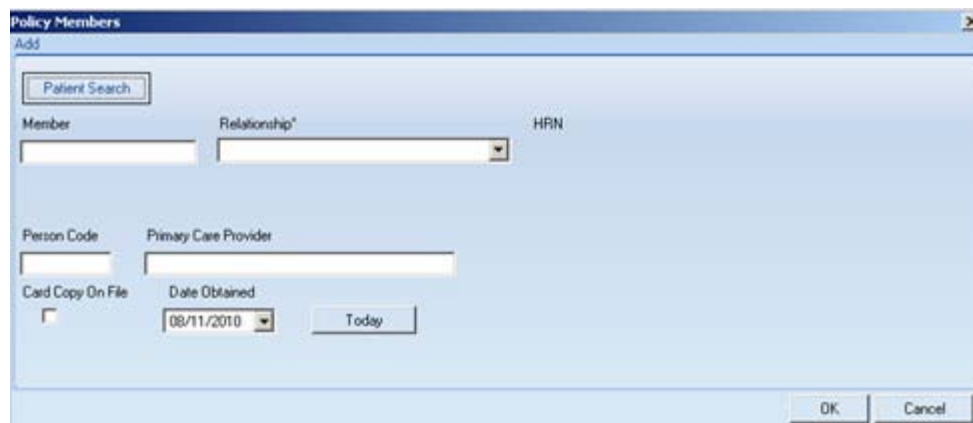


Figure 3-46: Policy Members dialog box

After completing the Policy Members dialog box, click OK (otherwise, click Cancel). The save function populates the grid in the Policy Members area of the Edit Private Insurance window.

Click Patient Search to search for a patient name. The application displays the Scan for Matching Patients dialog box.

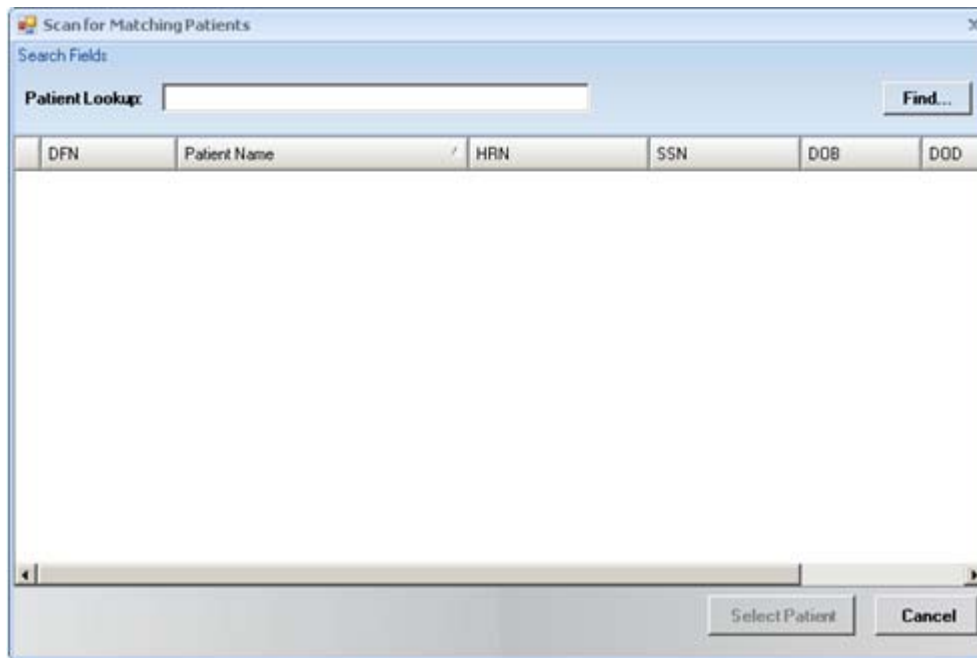


Figure 3-47: Scan for Matching Patients dialog box

Populate the Patient Lookup field with the first few characters (minimum of three) of the patient's last name and then click Find.

The application displays the records retrieved in the search in the grid.

To use one of the retrieved records, highlight it and then click Select Patient (otherwise, click Cancel).

If you clicked Select Patient, the patient data populates the Member field on the Policy Members dialog box.

Member

This is the name of the policy member. After this field is populated, the HRN of the patient displays (read-only).

Relationship

This is the relationship, such as cousin. Select an option from the drop-down list.

Person Code

Populate with the member's person code, using 2 to 10 characters. This code is used to uniquely identify each family member.

Primary Care Provider

Populate with the patient's primary care provider for the patient's plan. This is usually required for HMO/Managed Care plans.

Card Copy on File

Check this check box if a copy of the insurance card is on file. If you check this field, make sure to populate the Date Obtained field.

Date Obtained

Populate with the date the copy of the insurance card was on file. If the date is Today, click the Today button to populate this field.

3.8.4.2 Edit

Select a row in the grid that you want to change and click Edit (or press F3). The application displays the Policy Members dialog box. See Section 3.8.4.1 Add for more information about this dialog box.

3.8.4.3 Delete

Select a row in the grid that you want to delete and click Delete (or press the Delete key). The application confirms the deletion by displaying the Delete Row information message. Click Yes to delete (otherwise, click No).

4.0 New Patient

This section reviews how to enter a new patient into the system. There are several ways to search for a new patient:

Use the Patient Lookup feature—see Section 3.1 Patient Lookup for more information.

Use the New Patient function—see Section 4.1 Register Patient for more information.

Use the Mini Registration process (when there is an emergency and complete patient data cannot be entered)—see Section 4.2 Mini Registration for more information.

4.1 Register Patient

Use the New Patient function to register the new patient, where the patient has never been entered in the system before. Click New Patient to display the New Register Patient Registration window.

Figure 4-1: Initial New Patient Registration window

Use the fields in the upper group box to identify the new patient. The required fields have the asterisk (*) following their names. After populating the appropriate fields, click Scan for Duplicates. This causes the application to search for the patient and determine if the patient is a new one or not. In this search, the application tries to match the data entered on the New Register Patient Registration window.

If there are no matches, the application displays the Confirm add new patient dialog box (see below).

If one or more matches are found, the application displays the Potential Duplicates dialog box.

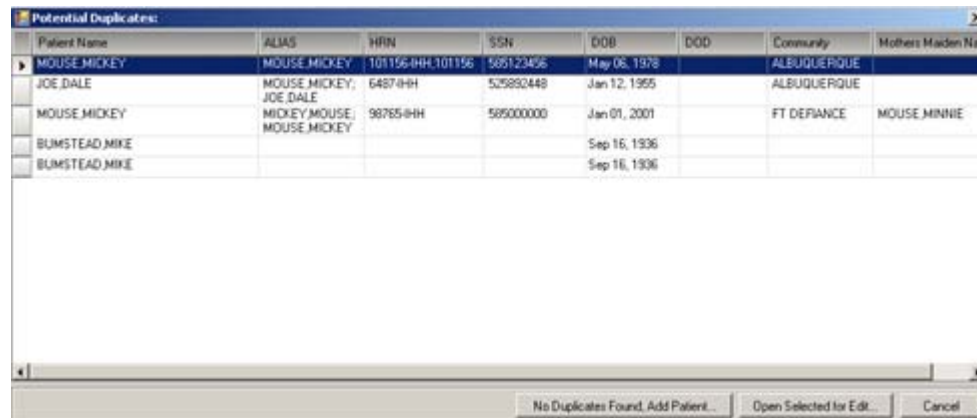


Figure 4-2: Sample Potential Duplicates dialog box

To exit the search process, click Cancel.

Patient is a Duplicate

If the patient is a duplicate, select the patient and then click Open Selected for Edit. The application displays the Patient Registration window for the patient. See section 5.0 Updating Patient Data for more information.

Patient Not a Duplicate

If the patient is not a duplicate, click No Duplicates Found Add Patient. The application displays the Confirm add new patient dialog box.



Figure 4-3: Sample Confirm add new patient dialog box

Click Cancel to not add a new patient. You return to the New Patient Registration dialog box (where you can re-enter a new patient name).

Click OK to confirm that you want to add a new patient. You return to the New Patient Registration dialog box; it uses the patient's DOB, SSN, and Sex fields you specified in the search. The Last Name, First Name, Middle, and Suffix fields will be inactive. All of the other fields will be active.

Figure 4-4: Sample Register Patient Registration window

After this window is complete, click Save (otherwise, click Cancel). The save function saves the “new” patient data.

Standard practice mandates that a face sheet be printed for each patient at the time of registration or edit. The face sheet should then be filed in the patient's chart so that if the clinic staff needs to contact the patient, the most current information and alternate resource information is available.

4.1.1 Patient Identifiers Group Box

The Patient Identifiers group box is where you add identifiers information about the new patient.

Figure 4-5: Patient Demographic fields

The required fields have the asterisk (*) following their names.

Name

The Last Name, First Name, Middle, and Suffix fields are read-only.

Date of Birth

Populate with the patient's date of birth or select one from the calendar on the drop-down list. If you manually enter the date, use any of the accepted date formats.

Social Security No

Enter the patient's social security number (required). Place your cursor in the field. As you type, the application will move to the new set of numbers, placing the dash (-) between the numbers. If there is no social security number, leave this field empty and use the Reason for no SSN field (in the Patient Demographics group box).

Assign Pseudo

The Assign Pseudo button is active when the Social Security No field is empty. Click Assign Pseudo to have the application assign a pseudo SSN for the patient.

Sex

Use one of the options from the drop-down list: Male or Female.

4.1.2 Patient Demographics Group Box

The Patient Demographics group box provides demographics information about the new patient.

Figure 4-6: Sample Patient Demographics Group Box

The required fields have the asterisk (*) following their names.

Health Record Number

The HRN is a number assigned to each patient by the Health Information Management (HIM) department (this may vary from site to site); in the past, this department was called Medical Records. The HRN can be used as an identifier to edit a patient's file as well as for billing and tracking of patient care. This free field accepts alphanumeric characters.

Assign Temp HRN

Use this button when the Health Record Number field is empty. Click Assign Temp HRN to have the application assign a temporary HRN number for the new patient.

Reason for no SSN

Use this field when the Social Security No field is empty. Valid entries are listed on the drop-down list: Not Available, Patient Refused, Patient will Submit.

Marital Status

Use one of the options from the drop-down list: Divorced, Married, Never Married, Separated, Single, Unknown, Widow/Widower.

Classification/Beneficiary

Use one of the options from the drop-down list.

Eligibility Status

Use one of the options from the drop-down list: CHS & Direct, Direct Only, Ineligible, Pending Verification. This status indicates the eligibility for care at an IHS facility. Native Americans cannot be ineligible for care.

Veteran

Check the Veteran check box if the patient is a veteran.

Note: The application checks the age of the patient. If the patient is not eligible to be a veteran, the Veteran check box will show a missing data icon next to it. The hover help explains why the patient is not eligible. In this case, uncheck the Veteran check box (this causes the other fields to be inactive).

After you check the Veteran check box and saved the patient data, the application will display the Veteran Information dialog box.

Figure 4-7: Veteran Information dialog box

After this dialog box is complete, click Save (otherwise, click Cancel). The Save function saves the veteran information; this information will display on the Veteran/Documents tab (when you edit the patient data).

Below are the fields:

Veteran

When the Veteran check box is selected, this indicates that the patient is a veteran; in addition, the other fields will be active. If you uncheck the check box, the other fields will become inactive.

Last Service Branch

Use one of the options from the drop-down list that indicates the name of the military branch in which the patient entered the last episode of military service.

Last Service Entry Date

Manually enter or use the drop-down list to select from the calendar a date that defines when the patient entered the last episode of military service.

Last Service Separation Date

Manually enter or use the drop-down list to select from the calendar a date that defines when the patient was separated from the last episode of military service.

Claim Number

Populate with this patient's claim number, using 6 or 7 characters, *or* enter 55 if the claim number is the same as the patient's SSN.

Receiving Disability

Use the option on the drop-down list (yes, no, unknown) to determine if the patient is receiving VA disability.

Description of Service Disability

Populate with a description of the service disability, using 3 to 60 characters (can be left empty).

Valid VA Card

Check the Valid VA Card check box to indicate that the patient has a valid VA card.

Date VA Card Copy Obtained

Manually enter or use the drop-down list to select from the calendar the date the copy of the VA card was obtained. If you want to populate the field with today's date, click the Today button.

Is Service Connected

Check the "Is Service Connected" check box to indicate that the disability is service connected.

Vietnam Service Indicated

Check the "Vietnam Service Indicated" check box to indicate that the disability is Vietnam Service indicated.

4.1.3 Tribal Group Box

The image shows a screenshot of a software form titled "Tribal Information". It contains four input fields arranged horizontally. From left to right: "Indian Blood Quantum:" followed by a text box; "Tribe of Membership:" followed by a drop-down menu; "Tribe Quantum:" followed by a text box; and "Tribal Enrollment Number:" followed by a text box. The form has a light blue header and a white background for the fields.

Figure 4-8: Tribal group box data fields

The required fields have the asterisk (*) following their names.

Indian Blood Quantum

Populate with a fraction of the total Indian blood in which the patient is enrolled, in the form of numerator/denominator, or enter (F)ULL, (N)ONE, (UNK)NOWN, (UNS)PECIFIED. This must not be less than Tribe Quantum.

Tribe of Membership

Use one of the options from the drop-down list.

Tribe Quantum

Populate with patient's tribal blood quantum, expressed as a fraction of Indian blood in numerator/denominator form, or enter (F)ULL, (N)ONE, (UNK)NOWN, (UNS)PECIFIED.

Tribal Enrollment Number

This free-text field accepts alphanumeric characters for the enrollment number. This is the patient's Tribal enrollment number.

4.1.4 Address Group Box

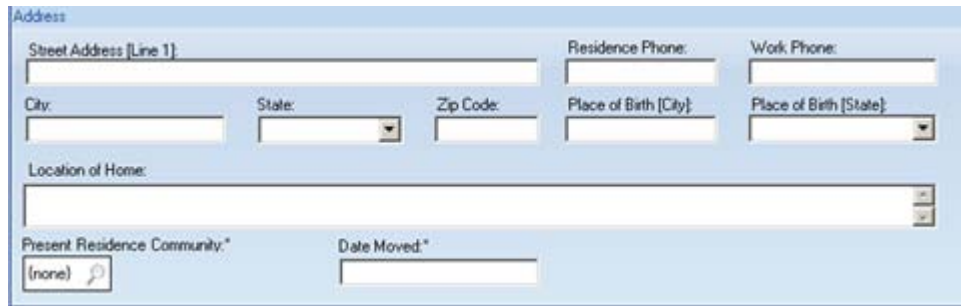
The screenshot shows a form titled "Address" with several input fields. At the top, there are three text boxes: "Street Address [Line 1]", "Residence Phone:", and "Work Phone:". Below these are five more fields: "City:", "State:" (a dropdown menu), "Zip Code:", "Place of Birth [City]:", and "Place of Birth [State]:" (a dropdown menu). A large text area labeled "Location of Home:" is positioned below the birth information. At the bottom, there are two fields: "Present Residence Community:" with a search icon and "(none)", and "Date Moved:".

Figure 4-9: Address data fields

The required fields have the asterisk (*) following their names.

Street Address

This is the street address of the patient's residence. This free-text field allows alphanumeric characters.

Residence Phone

This is the phone number of the patient's residence. This free-text field accepts numeric digits. Be sure to include the area code.

Work Phone

This is the phone number of the patient's place of work. This free-text field accepts numeric digits. Be sure to include the area code.

City

This is the city of the patient's residence. This free-text field allows alphanumeric characters.

State

This is the state of the patient's residence. Use any option from the drop-down list that contains the names of all 50 states in the United States or other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Zip Code

This is the zip code of the patient's residence. This field will accept 10 digits.

Place of Birth (City)

This is the city of the patient's place of birth. This free-text field accepts alphanumeric characters.

Place of Birth (State)

This is the state of the patient's place of birth. Use any option from the drop-down list that contains all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, and then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Location of Home

Use this free-text field to add a narrative describing how to get to the patient's home (optional field).

Present Residence Community

This is the community of the patient's residence. Click the magnifying glass icon to access the Table Lookup dialog box where you search for a community. After clicking Select on the dialog box, the selection populates this field. See Section 3.5 Table Lookup for more information this dialog box.

Date Moved

Specify the date the patient moved to the community. The drop-down list contains a calendar from which to select a date. Otherwise, manually enter the date, using any of the accepted date formats.

4.2 Mini Registration

Use the Mini Registration process to enter the mandatory information about the new patient. Use this process when adding a new patient to the system but you do not have all of the required information or are entering the patient in an environment that doesn't permit you to take the time to fully enter the patient data (e.g., an emergency room).

The Quick Registration allows you to partially enter new patient data and then return to the file at a later time to finish. Completing the data entry process is critical because a patient's insurance information is not entered through Mini Registration, preventing the facility from billing for the patient's care.

Click the Mini Registration button to access the New Patient Mini Registration window.

Figure 4-10: New Patient Mini Registration window

Use the fields in the upper group box to identify the new patient. The required fields have the asterisk (*) following their names. See Section 4.1.1 Patient Identifiers Group Box for more information about the fields.

After populating the appropriate fields, click Scan for Duplicates. This causes the application to search for the patient and to determine if this is a new patient or not. The application searches for matches on all of the fields.

If there are no matches, the application displays the Confirm Add New Patient dialog box. See below for more information about this dialog.

If there are one or more matches, the application displays the Potential Duplicates dialog box.

Patient Name	ALIAS	HFN	SSN	DOB	DOD	Community	Mothers Maiden Name
MOUSE, MICKEY	MOUSE, MICKEY	101156-IHH,101156	585123456	May 06, 1978		ALBUQUERQUE	
JOE DALE	MOUSE, MICKEY; JOE DALE	6487-IHH	52980448	Jan 12, 1955		ALBUQUERQUE	
MOUSE, MICKEY	MICKEY MOUSE; MOUSE, MICKEY	98765-IHH	585000000	Jan 01, 2001		FT DEFANCE	MOUSE MINNIE
BUMSTEAD, MIKE				Sep 16, 1936			
BUMSTEAD, MIKE				Sep 16, 1936			

Figure 4-11: Sample Potential Duplicates dialog box

To exit the search process, click Cancel. You return to the New Patient Mini Registration window. Then you can start over.

Patient is a Duplicate

If the patient is a duplicate, select the patient and then click the Open Selected for Edit button. The application displays the Patient Registration window for the patient. See section 5.0 Updating Patient Data for more information.

Patient Not a Duplicate

If the patient is not a duplicate, click No Duplicates Found Add Patient. The application displays the Confirm add new patient dialog box.

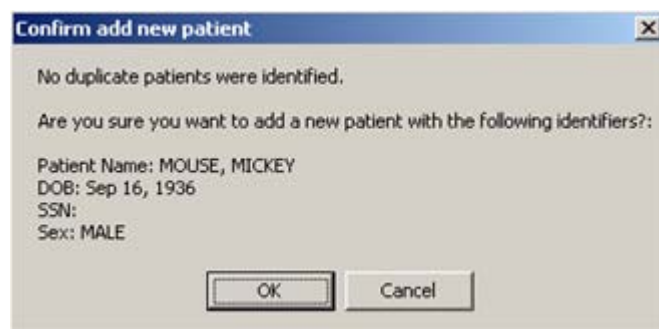


Figure 4-12: Sample Confirm add new patient dialog box

Click Cancel to not add a new patient. You return to the New Patient Registration dialog box (where you can reenter a new patient name).

Click OK to confirm that you want to add a new patient. You return to the New Patient Registration dialog box; it uses the patient's DOB, SSN, and Sex fields you specified in the search. The Last Name, First Name, Middle, and Suffix fields will be inactive. All of the other fields will be active.

Figure 4-13: Sample populated New Patient Mini Registration window

After this window is complete, click Save to save the data (otherwise, click Cancel to leave without saving). You can complete the other new patient data at a later date.

4.2.1 Patient Identifiers Group Box (Mini Registration)

The screenshot shows a form titled "Patient Identifiers" with the following fields and controls:

- Last Name***: Text input field containing "BROWN".
- First Name**: Text input field containing "LUCY".
- Middle**: Text input field.
- Suffix**: Text input field.
- Date of Birth***: Drop-down menu showing "09/03/1965".
- Social Security No.**: Text input field.
- Assign Pseudo**: Button.
- Sex***: Drop-down menu showing "FEMALE".

Figure 4-14: Patient Identifiers group box (mini registration)

The required fields have the asterisk (*) following their names.

Name

The Last Name, First Name, Middle, and Suffix fields are read-only.

Date of Birth

Populate with the patient's date of birth or select one from the calendar on the drop-down list. If you manually enter the date, use any of the accepted date formats.

Social Security No

Enter the patient's SSN (required). Place your cursor in the field. As you type, the application will move to the new set of numbers, placing the dash (-) between the number. If there is no SSN, leave this field empty and use the Reason for no SSN field (in the lower group box).

Assign Pseudo

The Assign Pseudo button is active as long as the Social Security No field is empty. Click Assign Pseudo to have the application assign a pseudo SSN for the patient.

Sex

Use one of the options from the drop-down list: Male or Female.

4.2.2 Lower Group Box Fields (Mini Registration)

The screenshot shows a form titled "Lower Group Box Fields" with the following fields and controls:

- Health Record Number***: Text input field.
- Assign Temp HRN**: Button.
- Marital Status**: Drop-down menu.
- Reason for no SSN**: Drop-down menu.
- Location of Home**: Text input field.

Figure 4-15: Fields in lower group box (mini registration)

The required fields have the asterisk (*) following their names.

Health Record Number

The HRN is a number assigned to each patient by the HIM department (this may vary from site to site); in the past, this department was called Medical Records. The HRN can be used as an identifier to edit a patient's file as well as for billing and tracking of patient care. This free field accepts alphanumeric characters.

Assign Temp HRN

Use this button when the HRN field is empty. Click Assign Temp HRN to have the application assign a temporary HRN number for the new patient.

Marital Status

Use one of the options from the drop-down list: Divorced, Married, Never Married, Separated, Single, Unknown, Widow/Widower.

Reason for no SSN

Use this field when the Social Security No field is empty. Valid entries are listed on the drop-down list: Not Available, Patient Refused, Patient will Submit.

Location of Home

Use this free-text field to add a narrative describing how to get to the patient's home (optional field).

5.0 Updating Patient Data

This section reviews how to update patient data already in the system.

You can establish which patient you want to use in one of two ways.

Option One: Use the Patient Lookup process to select the patient you want to use. See Section 3.1 Patient Lookup for more information.

Option Two: Select a patient in the Patient Workspace.

After selecting the patient, the application displays the patient registration window.

Demographics/ER Contact		Family/Tribal/NOK	Alt. Resources	Veteran/Documents	Other Patient Data	Reg Notes
NAME: DEMO.FIVE (HRN: 77777)		LAST UPDATED: Feb 19, 2010 (AL)				
DOB: Jan 01, 1920 90YRS	Eligibility: CHS DIRECT	RHI:				
SEX: MALE	Classification/Beneficiary: NON-INDIAN ELECTIVE	NPP: YES				
SSN: XXX-XX-2323	Alt. Resources: YES	ROI: Jan 01, 2001				
Community: WINDOW ROCK	Veteran: YES	AOB: Jan 01, 2001				
Personal Detail Shortcut Key: P Edit						
HRN: 77777	Social Security #: XXX-XX-2323					
Name: DEMO.FIVE	Reason for NO SSN:					
Sex: M	Place of Birth (City): PORTLAND					
Date of Birth: Jan 01, 1920 90YRS	Place of Birth (State): OREGON					
Marital Status: MARRIED	Employment Status: RETIRED					
Employer: RETIRED	Religious Preference: BAPTIST					
Address Shortcut Key: A Edit						
Street Address [1]: 1234 CHERRY STREET	Residence Phone: 5059887766					
Street Address [2]:	Work Phone:					
Street Address [3]:	Other Phone: 505-777-5555					
City, State, Zip: WINDOW ROCK, ARIZONA, 87551	Location of Home: APPROXIMATELY 2 BLOCKS SOUTH OF THE OLD OAK TREE					
Current Community: WINDOW ROCK (APACHE)						
Date Moved: JUN 1, 2010						
Emergency Contact Shortcut Key: E Edit						
Name: SMITH, SARAH	Street Address: 1234 MAIN					
Phone: 505-333-4444						
Work Phone:						
Relationship: DAUGHTER	City, State, Zip: ALBUQUERQUE, NEW MEXICO, 87551					
Other Relation:						

Figure 5-1: Sample Patient Registration window

The Patient Registration window has two areas: (1) the patient registration data area and (2) the patient registration tabs.

- The patient registration data area provides demographic information about the current patient.
- The number of errors/warnings found about the patient data
- The patient data has the following tabs: Demographic/ER Contact, Family/Tribal/NOK, Alt. Resources, Veteran/Documents, Other Patient Data, Reg Notes. These tabs are described below.

- After saving the data on the various tabs, consider the following standard practice: Standard practice mandates that a face sheet be printed for each patient at the time of registration or edit. The face sheet should then be filed in the patient's chart so that if the clinic staff needs to contact the patient, the most current information and alternate resource information is available.

The patient banner data demographic area remains visible as you move from tab to tab. Click the collapse button (in upper left) to collapse this area. This action causes only the patient name and HRN to display.

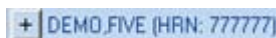


Figure 5-2: Upper area collapsed

Use the Close button (in the upper, right corner) to dismiss the window.

5.1 Warning/Errors

If the current patient data has errors or warning, click Display Error Checks to display the error/warnings found information.

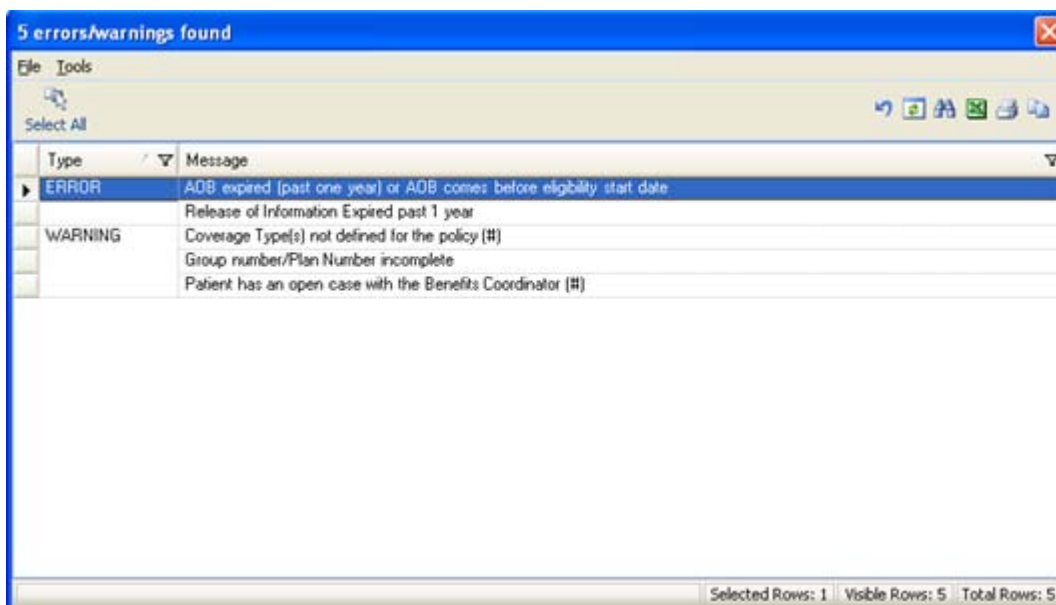


Figure 5-3: Sample missing data

The information on this area informs you what needs to be corrected about the current patient registration data.

See Section 3.7 Using the Errors/Warning Found for more information about this window.

5.2 Demographics/ER Contact Tab

The Demographics/ER Contact tab contains personal detail, address information, and emergency contact information about the current patient.

Demographics/ER Contact		Family/Tribal/NOK	All Resources	Veteran/Documents	Other Patient Data	Reg Notes
Personal Detail Shortcut Key: P Edit						
HRN:	777777	Social Security #:	XXXXXX-2323			
Name:	DEMO.FIVE	Reason for NO SSN:				
Sex:	M	Place of Birth (City):	PORTLAND			
Date of Birth:	Jan 01, 1920 90 YRS	Place of Birth (State):	OREGON			
Marital Status:	MARRIED	Employment Status:	RETIRED			
Employer:	RETIRED	Religious Preference:	BAPTIST			
Address Shortcut Key: A Edit						
Street Address [1]:	1234 CHERRY STREET	Residence Phone:	5059887766			
Street Address [2]:		Work Phone:				
Street Address [3]:		Other Phone:	505-777-5555			
City, State, Zip:	WINDOW ROCK, ARIZONA, 87551	Location of Home:	APPROXIMATELY 2 BLOCKS SOUTH OF THE OLD OAK TRE			
Current Community:	WINDOW ROCK (APACHE)					
Date Moved:	JUN 1, 2010					
Emergency Contact Shortcut Key: E Edit						
Name:	SMITH, SARAH	Street Address:	1234 MAIN			
Phone:	505-333-4444					
Work Phone:						
Relationship:	DAUGHTER	City, State, Zip:	ALBUQUERQUE, NEW MEXICO, 87551			
Other Relation:						

Figure 5-4: Sample Demographic/ER Contact tab

The Social Security # field displays the last four digits of the patient's SSN due to the Privacy Act. If you have the security key access you can hover on the social security number to display the entire number.

5.2.1 Personal Detail Window

Click Edit (on the Personal Detail group box) or use the shortcut key P (on your keyboard) to access the Personal Detail window.

Personal Detail for SMITH, SARAH - 54689			
Name			
Last*	First	Middle	Suffix
SMITH	SARAH		
HRN*	Social Security No:	Reason for No SSN:	SSN Verification Status:
777777	XXXXXX-6605		
Sex*	Marital Status:	Employment Status:	Employer*
FEMALE	MARRIED	FULL-TIME	NEW MEXICO STATE POLICE
Date Of Birth:	Place of Birth (City):	Place of Birth (State):	Religious Preference:
02/02/1950	GALLUP	NM-NEW MEXICO	BAPTIST
Save Cancel			

Figure 5-5: Sample Personal Detail window

After the Patient Detail window is complete, click Save (otherwise, click Cancel). The save function updates the Personal Detail group box on the Demographics/ER Contact tab.

The required fields have the asterisk after their names.

Name

Enter the patient's name in the Last, First, Middle, and Suffix fields.

HRN

This is the patient's health record number.

Social Security No

This field displays the last four digits of the patient's SSN. If this field is empty, you must populate the Reason for no SSN field.

Reason for no SSN

Use this field when the Social Security No field is empty. Valid entries are listed on the drop-down list: Not Available, Patient Refused, Patient will Submit.

SSN Verification Status

This view-only field will contain who verified that the SSN was correct. For example, it could contain Verified by SSA.

Sex

Use one of the options from the drop-down list: Male or Female.

Marital Status

Use one of the options from the drop-down list: Divorced, Married, Never Married, Separated, Single, Unknown, Widow/Widower.

Employment Status

This is the patient's employment status. Use one of the options from the drop-down list to populate this field.

Employer

This is the patient's employer. Click the magnifying glass icon to access the Table Lookup window where you search for the name of the employer. See Section 3.5 Table Lookup for more information about using this window. Remember you can use this window to remove the current name in this field.

Date of Birth

This is the patient's DOB. Select a date from the calendar on the drop-down list. If you manually enter the date, use any of the accepted date formats.

Place of Birth (City)

Specify the city of the patient's place of birth. This field allows alphanumeric characters.

Place of Birth (State)

Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Religious Preference

Use one of the options from the drop-down list.

5.2.2 Address Window

Click Edit (on the Address group box of the Demographics/ER Contact tab) or use the shortcut key A (on your keyboard) to access the Address window.

The screenshot shows a window titled "Address for DEMO,FIVE - 777777". Inside, there are several input fields and a list of radio buttons. The "Street Address" field contains "1234 CHERRY STREET". The "Phone" field contains "5059887766". The "City" field contains "WINDOW ROCK", the "State" dropdown is set to "AZ-ARIZONA", and the "Zipcode" field contains "87551". The "Current Community" field contains "WINDOW ROCK". The "Location of Home" dropdown contains "APPROXIMATELY 2 BLOCKS SOUTH OF THE OLD OAK TREE". The "County" field contains "APACHE" and the "Date Moved" field contains "JUN 1, 2010". On the right side, there are three radio buttons labeled "HOME", "WORK", and "OTHER". At the bottom right, there are "Save" and "Cancel" buttons.

Figure 5-6: Sample Address window

This window contains the address data about the current patient.

After all of the fields are correct, click Save (otherwise, click Cancel). The save function updates the data in the Address Group on the Demographics/ER Contact tab.

The current information comes from the new patient registration process (or any information edited in other sessions).

Below are the fields on the Address window:

Street Address

This free text field allows alphanumeric characters.

Phone

You can enter the home, work, and other phone numbers. Each is a free text field that accepts numeric digits. Be sure to include the area code.

City

This free text field allows alphanumeric characters.

State

Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries outside the United States. You can enter the first letter of the state and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Zip Code

This field will accept 10 digits.

Current Community

This field displays the current community for the patient. If you need to change this field, click the magnifying glass icon to access the Table Lookup dialog where you search for a residence community. After clicking Select on the dialog box, the selection populates this field.

Location of Home

Use this free-text field to add a narrative describing how to get to the patient's home (optional field).

County

This view-only field displays the county in which the patient resides.

Date Moved

This is the date the patient moved to the current location. Select a date from the calendar on the drop-down list. Otherwise, manually enter the date, using any of the accepted date formats.

5.2.3 Emergency Contact Window

Click Edit (in the Emergency Contact group box) or use the shortcut key E (on your keyboard) to access the Emergency Contact window.

The screenshot shows a window titled "Emergency Contact DEMO,FIVE - 77777". It is divided into two main sections: "Emergency Contact" and "Next of Kin".

Emergency Contact Section:

- Buttons: "Copy Patient Address" and "Copy Address From Next of Kin".
- Name: SMITH,SARAH
- Phone: 505-333-4444
- Work Phone: (empty)
- Street Address: 1234 MAIN
- Relationship: DAUGHTER (dropdown menu)
- Other Relationship: (empty)
- City: ALBUQUERQUE
- State: NM-NEW MEXICO (dropdown menu)
- Zipcode: 87551

Next of Kin Section:

- Buttons: "Copy Patient Address" and "Copy Address From Emergency Contact".
- Name: DOE,JOHN
- Phone: (empty)
- Work Phone: (empty)
- Street Address: 9876 PARADISE
- Relationship: FRIEND (dropdown menu)
- Other Relationship: (empty)
- City: GALLUP
- State: NM-NEW MEXICO (dropdown menu)
- Zipcode: 87559

At the bottom right of the window are "Save" and "Cancel" buttons.

Figure 5-7: Sample Emergency Contact window

The Emergency Contact window provides information about emergency contact information for the patient and next of kin.

After the Emergency Contact window is complete, click Save (otherwise, click Cancel). The save function updates the data in the Emergency Contact group box on the Demographics/ER Contact tab.

5.2.3.1 Emergency Contact Group Box

The Emergency Contact group box contains data the person to contact in case of an emergency.

Figure 5-8: Sample Emergency Contact group box

If you populated the Next of Kin area and you want that address to appear in the Emergency Contact area, click Copy Address From Next of Kin.

Note: Phone numbers are not copied over and need to be updated.

If you want to populate the Street Address, City, State, and Zip fields with the patient's address, click the Copy Patient Address button.

The fields in the Emergency Contact group box are shown below.

Name

Populate with the emergency contact's name. Most often, this is the patient's spouse, mother, father, or grown child.

Phone

Populate with the emergency contact's phone number including the area code. The number entered into this field should be verified as accurate and should be the phone number that the emergency contact person can be reached at most often.

Work Phone

Populate with the emergency contact's work phone number including the area code.

Street Address

Populate with the emergency contact's street address.

Relationship

Use one of the options on the drop-down list to populate this field. This is the emergency contact's relationship to the patient. If no relationship is found from the list, enter Other; this causes the Other Relationship field to become active.

Other Relationship

This field becomes active if the Relationship field contain OTHER. Populate the other relationship field with the OTHER relationship, e.g., X-mother-in-law.

City

Populate with the emergency contact's city of residence. Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

State

Populate with the emergency contact's state of residence.

Zip Code

Populate with the emergency contact's zip code.

5.2.3.2 Next of Kin Group Box

The Next of Kin group box contains data about the next of kin. This usually is a spouse, parent, or child.

The screenshot shows a 'Next of Kin' form with two tabs: 'Copy Patient Address' and 'Copy Address From Emergency Contact'. The 'Copy Patient Address' tab is active. The form contains the following fields:

- Name: DOE, JOHN
- Street Address: 9876 PARADISE
- City: GALLUP
- State: NM-NEW MEXICO
- Phone: (empty)
- Work Phone: (empty)
- Relationship: FRIEND
- Other Relationship: (empty)
- Zipcode: 87559

Figure 5-9: Sample Next of Kin group box

If you populated the Emergency Contact area and you want that address to appear in the Next of Kin area, click Copy Address from Emergency Contact.

Note: Phone numbers are not copied over and need to be updated.

If you want to populate the Street Address, City, State, and Zip fields with the patient's address, click Copy Patient Address.

The fields in the Next of Kin group box are shown below.

Name

Populate with the next of kin's name. Most often, this is the patient's spouse, mother, father, or grown child.

Phone

Populate with the next of kin's phone number including area code. The number entered into this field should be verified as accurate and should be the phone number that the emergency contact person can be reached at most often.

Work Phone

Populate with the next of kin's work phone number including area code.

Street Address

Populate with the next of kin's street address.

Relationship

Use one of the options on the drop-down list to populate this field. This is the next of kin's relationship to the patient. If no relationship is found, enter Other; this causes the Other Relationship field to become active.

Other Relationship

This field becomes active if the Relationship field contains OTHER. Populate the other relationship field with the OTHER relationship; e.g., X mother-in-law.

City

Populate with the next of kin's city of residence.

State

Populate with the next of kin's state of residence. Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Zip Code

Populate with the next of kin's zip code.

5.3 Family/Tribal/NOK Tab

The Family/Tribal/NOK tab shows Family Detail, Tribal Membership, and Next of Kin information.

5-10: Sample Family/Tribal Tab

5.3.1 Family Detail

The Family Detail area provides information about the patient’s father and mother.

Figure 5-11: Sample Family Detail data fields

Click Edit or use the shortcut key F (on your keyboard) to access the Family Detail window.

Figure 5-12: Sample Family Detail window

When the Family Detail window is complete, click Save (otherwise, click Cancel). The save function updates the data on the Family Detail area of the Family/Tribal/NOK tab.

Any field with a magnifying glass icon accesses the Table Lookup window. See Section 3.5 Table Lookup for more information about how to use this dialog box.

Below are the fields.

Father's Name

Specify the name of the patient's father.

Father's City of Birth

Specify the city of birth for the patient's father.

Father's State of Birth

Specify the state of birth for the patient's father. Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Father's Employer

Click the magnifying glass icon for the Father's Employer field to access the Table Lookup dialog box. Here you search for an employer name.

Mother's Name

Specify the name of the patient's mother.

Mother's City of Birth

Specify the city of birth for the patient's mother.

Mother's State of Birth

Specify the state of birth for the patient's mother. Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Mother's Maiden Name

Specify the maiden name of the patient's mother.

Mother's Employer

Click the magnifying glass icon for the Mother's Employer field to access the Table Lookup dialog. Here you search for an employer name.

Spouse's Employer

Click the magnifying glass icon for the Spouse's Employer field to access the Table Lookup dialog box. Here you search for an employer name.

5.3.2 Tribal Membership

The Tribal Membership area provides information about the patient's membership in a tribe.

Tribal Membership		Shortcut Key: T	Edit
Classification/Beneficiary:	INDIAN/ALASKA NATIVE	Eligibility Status:	CHS DIRECT
Tribe of Membership:	TOHONO O'ODHAM NATION OF ARIZONA	Tribal Enrollment No:	12356
Indian Blood Quantum:	FULL	Tribe Quantum:	FULL
Other Tribes:		Religious Preference:	CATHOLIC

Figure 5-13: Sample Tribal Membership data fields

Click Edit or use the shortcut key T (on your keyboard) to access the Tribal Membership window.

Figure 5-14: Sample Tribal Membership window

When the Tribal Membership window is complete, click OK (otherwise, click Cancel). The save function updates the data in the Tribal Membership area of the Family/Tribal/NOK tab.

Classification/Beneficiary

Use one of the options from the drop-down list.

Eligibility Status

Use one of the options from the drop-down list: CHS & Direct, Direct Only, Ineligible, Pending Verification. This status indicates the eligibility for care at an IHS facility. Native Americans cannot be ineligible for care.

Indian Blood Quantum

Populate with a fraction of Indian blood in numerator/denominator or enter F, Full, N, None, UNK, Unknown, UNS, Unspecified. Must not be less than Tribe quantum.

Tribe of Membership

Use one of the options from the drop-down list.

Tribe Quantum

Populate with patient's tribal blood quantum using a fraction in numerator/denominator or enter F, Full, N, None, UNK, Unknown, UNS, Unspecified. This is a required field.

Tribal Enrollment Number

This free text field accepts alphanumeric characters for the enrollment number. This is the patient's tribal enrollment number.

The Other Tribe area is where you add/remove other tribe information about the patient.

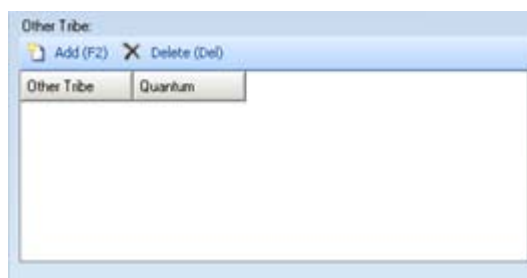


Figure 5-15: Other Tribe area

Add

Use the Add function to add other tribe information. Click Add (or press F2) to access the Other Tribe dialog box.



Figure 5-16: Other Tribe dialog box

Select an option from the Other Tribe drop-down list to specify the patient's other tribe. Click OK (otherwise, click Cancel). The save function adds a row to the Other Tribe grid on the Tribal Membership dialog.

The status (active/inactive) is controlled by the Registration Option menu in Roll and Scroll. On this menu, the Tribal Quantum field can be turned on or off.

Populate the Quantum field with the patient's other Tribal blood quantum using a fraction in numerator/denominator or enter **F, Full, N, None, UNK, Unknown, UNS, Unspecified**.

Edit

Select a row in the grid that you want to change and then click the Edit button (and press the F3 key on your keyboard). The application displays the Other Tribe dialog box. See the Add function (above) for more information. Click OK (otherwise, click Cancel). The save function adds a row to the Other Tribe grid on the Tribal Membership dialog box.

Delete

Select one or more rows in the grid that you want to delete and then click Delete (or press the Delete key on your keyboard). The application displays the Delete Rows information message, verifying that you want to delete the rows. Click Yes to delete the row. Click No to exit.

5.3.3 Next of Kin

Next Of Kin		Shortcut Key: N	Edit
Name:		Street Address:	
Phone:			
Work Phone:			
Relationship:		City, State, Zip:	
Other Relation:			

Figure 5-17: Sample Next of Kin data fields

Click Edit or use the shortcut key N (on your keyboard) to access the Emergency Contact window. See Section 5.2.3 Emergency Contact Window for more information.

5.4 Alt. Resources Tab

The Alternate Resources tab provides data for insurance data for the current patient.

Demographics/ER Contact		Family/Tribal/NOK	Alt. Resources	Veteran/Documents	Other Patient Data	Reg Notes
Release of Information: Jun 13, 2007		Assignment of Benefit: Jun 13, 2007		Shortcut Key: I Edit		
Insurance(s)	Group	Expand All	Collapse All	Filter	SHOW ACTIVE Refresh	
New Insurance		Find				
Private Insurance - Count: 1						
EMPLOYERS DENTAL SERVICES				ACTIVE		Edit
Subscriber	DEMO_ALICIA	Elig Begin	Elig End	Member		
Policy No.		01/01/2008		DEMO_BOBBY		
Insurance Address	PO BOX 12010	01/01/2008		DEMO_JOHN		
	TUCSON, AZ 85732-2010					
Insurance Phone	(602) 722-3000					
Medicare - Count: 1						
MEDICARE				ACTIVE		Edit
Subscriber	DEMO_JOHN	Start Date	End Date	Coverage Type		
Policy No.	123456789	01/01/2001		PLAN D		
Date of Last Update	6/29/2010	01/01/2000		PLAN A		
		01/01/2000		PLAN B		

Figure 5-18: Sample Alternative Resources tab window

These insurance records are grouped by type. In addition they can be filtered by active/inactive or both.

5.4.1 Release of Information Area

The Release of Information provides information about the date of the Release of and the date for the Assignment of Benefits. To edit the data, click Edit (or use the shortcut key I from your keyboard) to access the Assignment of Benefits and ROI window.

Figure 5-19: Sample Assignment of Benefits and ROI window

After the window is complete, click Save (otherwise, click Cancel). The save function updates the Release of Information area on the Alt. Resources tab.

Below are the fields on the window:

Release of Information

Populate with the date effective for the release of information about insurance. If you want to populate the field with today's date, click Today (to the right of the Release of Information field). Otherwise, manually enter the date or click the drop-down list for the field and select a date from the calendar.

Assignment of Benefits

Populate with the date effective for the assignment of benefits. If you want to populate the field with today's date, click Today (to the right of the Assignment of Benefits field). Otherwise, manually enter the date or click the drop-down list for the field and select a date from the calendar.

Release of Information History

This field displays (view-only) the release of information history about the insurance.

Assignment Of Benefits History

This field displays (view-only) the assignment of benefits history about the insurance.

5.4.2 Insurances Area

The Insurances area has controls for filtering the insurance information, expanding or collapsing the group boxes, adding new private information, and various insurance information (e.g., Medicare insurance information).

EMPLOYERS DENTAL SERVICES		ACTIVE		Edit
Subscriber	DEMO ALICIA	Elig Begin	Elig End	Member
Policy No.		01/01/2008		DEMO BOBBY
Insurance Address	PO BOX 12010 TUCSON, AZ 85732-2010	01/01/2008		DEMO JOHN
Insurance Phone	(602)-722-3000			

MEDICARE		ACTIVE		Edit
Subscriber	DEMO JOHN	Start Date	End Date	Coverage Type
Policy No.	123456789	01/01/2001		PLAN D
Date of Last Update	6/29/2010	01/01/2000		PLAN A
		01/01/2000		PLAN B

Figure 5-20: Sample Insurances area

5.4.2.1 Group Function

The buttons in the Group area controls the expand/collapse status of the group insurances shown at the bottom of the Insurances group box.

Click Collapse All to cause the group insurances to be in a collapsed status.

Once the group insurances are in a collapses status, you can expand all of them by clicking Expand All.

5.4.2.2 Filter Function

Populate the Filter field by selecting an option from the drop-down list. The option controls what group insurances display at the bottom of the Insurances group box. The options are: Show Active, Show Inactive, Show Active/Inactive. Once you change the filter, click the Refresh button to refresh the display (otherwise, the display will not change).

5.4.2.3 New Insurance Function

Use the New Insurance field to search for another private insurance name. This lets you populate the Insurances group box with “new” private insurance information.

Populate the New Insurance field with the name of the private insurance and then click Find. The application displays the Select Insurance window, showing the results of the search.

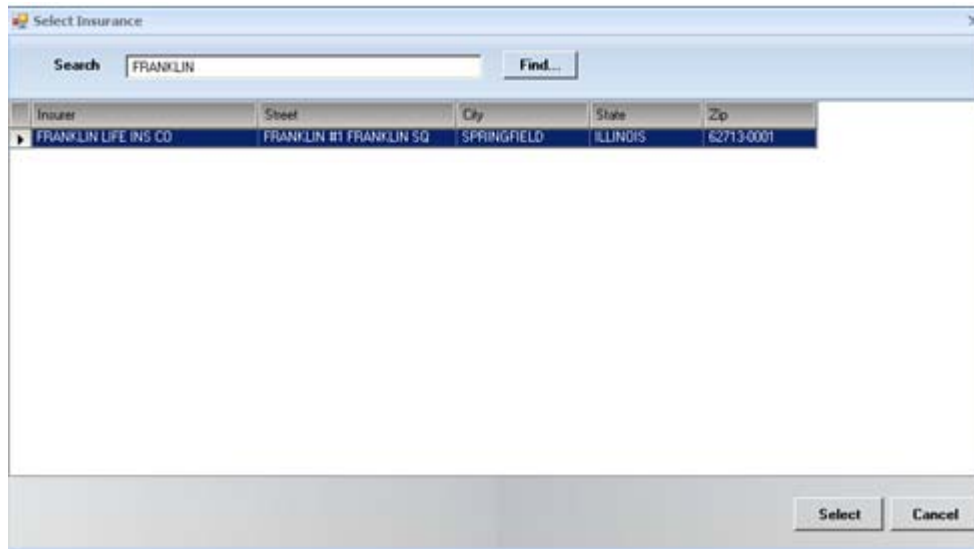


Figure 5-21: Sample Select Insurance window

To establish the new private insurance, select a record from the grid and click Select (otherwise, click Cancel). The select function accesses the Edit Private Insurance window.

Policy Holder Information

Policy Holder* Relationship to Insured* Policy or SSN*

Address - Street* Date Of Birth* Gender*

City* State* Zip Code* Phone*

Effective Date* Expiration Date* Card Name* Member Number*

Employment Status* Employer* Person Code* Primary Care Provider*

Insurer Information

FRANKLIN LIFE INS CO Group Name Group Number

FRANKLIN #1 FRANKLIN SQ (none)

SPRINGFIELD, ILLINOIS 62713-0001 Coverage Type Card Copy On File Date Obtained Today

Policy Members

Members	Person Code	Member Num	Relationship	HFN	Elig. Date	Elig. End Date
---------	-------------	------------	--------------	-----	------------	----------------

Figure 5-22: Sample Edit Private Insurance window

When this window is complete, click Save (otherwise, click Cancel). The save function saves the data about the new private insurance.

See Section 3.8 Edit Private Insurance Window for more information about completing the window.

5.4.3 Private Insurance Area

The private insurances of the patient display in the lower area of the Alt. Resources tab, if any. You can change the display by using the expand/collapse button in the upper left corner.

EMPLOYERS DENTAL SERVICES		ACTIVE		Edit
Subscriber	DEMO,ALICIA	Elig Begin	Elig End	Member
Policy No.		01/01/2008		DEMO,BOBBY
Insurance Address	PO BOX 12010 TUCSON, AZ 85732-2010	01/01/2008		DEMO,JOHN
Insurance Phone	(602)-722-3000			

Figure 5-23: Private Insurance data fields

The grid shows the start and end date of the particular coverage type.

Click the Edit button to access the Edit Private Insurance window. Here you can edit the private insurance information.

See Section 3.8 Edit Private Insurance Window for more information about completing the window.

5.4.4 Medicare Area

The Medicare area provides data about Medicare insurance for the patient.

MEDICARE		ACTIVE		Edit
Subscriber	DEMO,JOHN	Start Date	End Date	Coverage Type
Policy No.	123456789	01/01/2001		PLAN D
Date of Last Update	6/29/2010	01/01/2000		PLAN A
		01/01/2000		PLAN B

Figure 5-24: Sample Medicare area

The Medicare area shows the filter for the insurance (Active, for example), the subscriber, policy number, and date of last update.

The grid provides information about the start and end date for the various types of Medicare coverage.

All patients with Medicare coverage are issued a Medicare ID card when they are approved. Medicare coverage is not automatically extended to spouses or children. If the patient intends to use this coverage immediately, make sure that the Eligibility date is no later than the current date.

Click Edit to access the Edit Medicare window.

The screenshot shows the 'Edit Medicare' window with the following fields and values:

- Release of Information Date*: 03/22/2003
- Today button
- Date of Last Update: 05/29/2010
- Medicare Name: DEMO,JOHN
- Medicare Number*: 123456789
- Medicare Suffix*: A
- Primary Care Provider: (empty)
- Medicare Date Of Birth*: 01/01/1950
- QMB/SLMB: (empty)
- Card Copy On File:
- Date Obtained: 07/23/2003
- Today button

The Eligibility section contains a table with the following data:

Eligibility Date	Type of Coverage	Eligibility End Date	Plan Name	Medicare Name
Jan 01, 2000	PLAN A			
Jan 01, 2000	PLAN B			
Jan 01, 2001	PLAN D		D-HUMANA STANDARD	DEMO,JOHN

Buttons: Add (F2), Edit (F3), Delete (Del), Save, Cancel

Figure 5-25: Sample Edit Medicare window

When the Edit Medicare window is complete, click Save (otherwise, click Cancel). The save function updates the data on the Medicare area of the Alt. Resources tab.

5.4.4.1 Medicare Group Box

The Medicare group box provides information about the Medicare insurance.

The screenshot shows the Medicare group box with the following fields and values:

- Release of Information Date*: 03/22/2003
- Today button
- Date of Last Update: 05/29/2010
- Medicare Name: DEMO,JOHN
- Medicare Number*: 123456789
- Medicare Suffix*: A
- Primary Care Provider: (empty)
- Medicare Date Of Birth*: 01/01/1950
- QMB/SLMB: (empty)
- Card Copy On File:
- Date Obtained: 07/23/2003
- Today button

Figure 5-26: Sample Medicare group box

The required fields have the asterisk after their names.

Release of Information Date

Manually enter the release of information date or use the drop-down list to select a date from the calendar. If the date is today, click Today.

Date of Last Update

This read-only field shows the date the Medicare information was last updated.

Medicare Name

Populate with the name of the patient as printed on the Medicare card. This is the primary insured person. Make sure that the patient's name appears preprinted on the ID card. If the name on the card is incorrect, enter it as it appears on the card. Then instruct the patient to contact Medicare directly to correct the name on the ID card.

Medicare Number

Populate with the Medicare ID number, without the suffix, using 9 digits.

Medicare Suffix

Populate with the Medicare ID number suffix.

Primary Care Provider

Populate with the name of the patient's primary provider, for example, MORGAN,JAMESPAUL,JR.

Medicare Date Of Birth

Manually enter or use the drop-down list to select from the calendar that is the patient's DOB as printed on the Medicare card. If the DOB on the card is incorrect, use the one on the card. Then instruct the patient to contact Medicare directly to correct the DOB on the ID card.

QMB/SLMB

Use one of the options from the drop-down list, indicating the patient's beneficiary status. WMB stands for Qualified Medical Beneficiary and SLMB stands for Specific Low Income Medical Beneficiary.

Card Copy On File

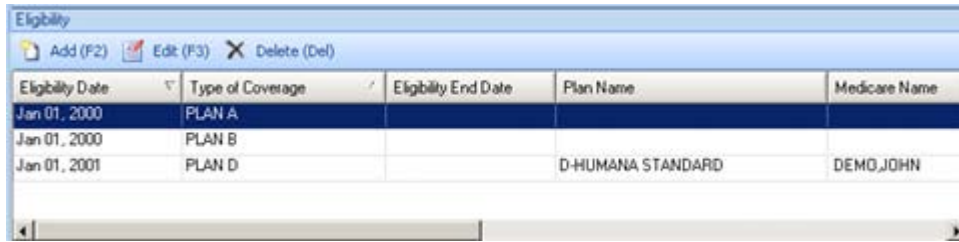
Check the Card Copy on File check box if a copy of the Medicare card is on file and placed in the patient's chart.

Date Obtained

Manually enter or use the drop-down list to select from the calendar the date the copy of the Medicare card was placed in the patient's chart. If the date is Today, click the Today button.

5.4.4.2 Eligibility Group Box

The Eligibility group box shows the Medicare eligibility dates and other data for the patient.



Eligibility Date	Type of Coverage	Eligibility End Date	Plan Name	Medicare Name
Jan 01, 2000	PLAN A			
Jan 01, 2000	PLAN B			
Jan 01, 2001	PLAN D		D-HUMANA STANDARD	DEMO,JOHN

Figure 5-27: Sample Eligibility group box

5.4.4.2.1 *Add*

Use the Add function to add a new record to the Eligibility grid. After clicking Add (or pressing F2), the application displays the Medicare Eligibility dialog box.

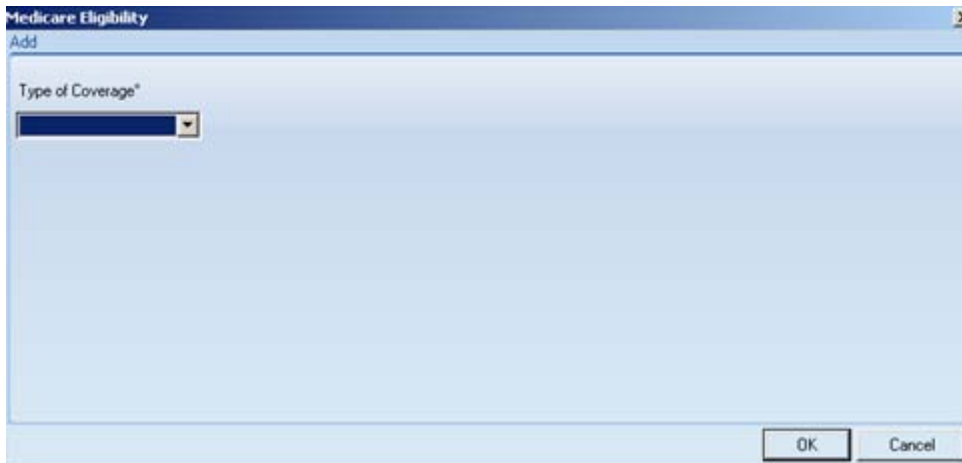


Figure 5-28: Sample Medicare Eligibility dialog box

The required field has the asterisk (*) after its name.

Type of Coverage

This is the type of Medicare coverage. Select an option from the drop-down list. The options are Plan A, Plan B, or Plan D.

If you select Plan A or Plan B, the application displays the Medicare Eligibility – Add window with two fields: Eligibility Start Date and Eligibility End Date. These fields are discussed below.

If you select Plan D, the application displays the Medicare Eligibility–Add window.

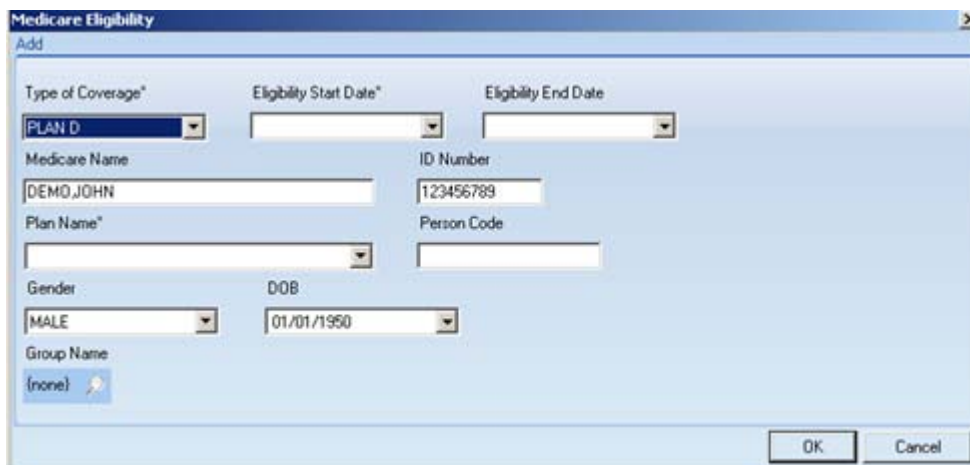


Figure 5-29: Medicare Eligibility – Add window

After this dialog is complete, click OK (otherwise, click Cancel). The save function updates the grid on the Eligibility group box on the Edit Medicare window with the new record.

Type of Coverage

This is the type of Medicare coverage that you selected. You can change this field by selecting an option the drop-down list.

Eligibility Start Date

Manually enter or select from the drop-down list the date that is the coverage's eligibility start date, as listed on the patient's Medicare card.

Eligibility Start Date

Manually enter or select from the drop-down list the date that is the coverage's eligibility end date, as listed on the patient's Medicare card.

Medicare Name

This is the primary insured person. Populate with the name of the patient as printed on the Medicare card. Make sure that the patient's name appears preprinted on the ID card. If the name on the card is incorrect, enter it as it appears on the card. Then instruct the patient to contact Medicare directly to correct the name on the ID card.

ID Number

Populate with the patient's Medicaid number, using 6 to 30 characters.

Plan Name

Use one of the options from the drop-down list that defines the plan name (found on the patient's Medicaid card). This is the local plan name.

Person Code

Populate with the policy holder's person code, using 2 to 10 characters. This code is used to uniquely identify each family member.

Gender

Populate with the policy holder's gender by selecting an option from the drop-down list: Male or Female.

DOB

Manually enter or use the drop-down to select from the calendar the date of the patient's DOB as it appears on the Medicaid card. If the date of birth on the card is incorrect, you still must enter it into the system as it appears on the card. Instruct the patient to contact Medicaid directly to correct their date of birth.

Group Name

Populate with the Medicaid group name. Click the "Magnifying Glass" icon to access the Table Lookup window where you can search for the group name. See section 3.5 Table Lookup for more information.

5.4.4.2.2 Edit

Select a record in the grid that you want to change and then click the Edit button (or press the F3 key on your keyboard). The application displays the Medicare Eligibility dialog. See section 5.4.4.2.1 Add for more information about this dialog. After populating the Type of Coverage field, you will be working on the Medicare Eligibility – Edit window; this window has the same fields as the Medicare Eligibility – Add window.

5.4.4.2.3 Delete

Select a record in the grid that you want to delete and then click the Delete button (or press the Delete key on your keyboard). The application displays the Delete Row information message that states: You have selected 1 row for deletion. Choose Yes to delete the row or No to exit. Click Yes to delete the row (otherwise, click No to not delete). Please note, you can select more than row to delete.

5.4.5 Medicaid Area

The Medicaid area provides data about Medicaid coverage for the patient.

MEDICAID		ACTIVE			Edit
Subscriber	DUCK, DAFFY E	Start Date	End Date	Coverage	
Policy No.	105101992	01/01/1994		04	
Plan					
State	NEW MEXICO				

Figure 5-30: Sample Medicaid area

The Medicaid area shows the filter for the insurance (Active, for example), the subscriber, policy number, plan, and state of the Medicaid insurance.

The grid provides information about the start and end date for the various types of Medicaid coverage.

5.4.5.1 Edit Medicaid Window

Click the Edit button in the Medicaid area to access the Edit Medicaid window.

Eligibility Start Date	Eligibility End Date	Coverage Type
Jan 01, 1994		04

Figure 5-31: Sample Edit Medicaid window

When the Edit Medicaid window is complete, click Save (otherwise, click Cancel). The save function updates the data in the Medicaid area of the Alt. Resources tab.

5.4.5.2 Fields on Edit Medicaid Fields Window

Below are the fields on the Edit Medicaid Fields window

Medicaid Name

Populate with the patient's name, as defined by the state's Medicaid system, using 3 to 30 characters.

Medicaid Number

Populate with the patient's Medicaid number, using 6 to 30 characters.

Medicaid Date of Birth

Use the drop-down to select from the calendar the date of the patient's DOB as it appears on the Medicaid card. If the date of birth on the card is incorrect, you still must enter it into the system as it appears on the card. Instruct the patient to contact Medicaid directly to correct their date of birth.

- The valid dates are between 1850 and today.
- If the DOB is before 1900, make sure to include the century.

State

Specify the state in which the patient has Medicaid coverage. Use any option from the drop-down list that contains the names of all 50 states in the United States. You can enter the first letter of the state and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state).

Plan

Use one of the options from the drop-down list that defines the plan name (found on the patient's Medicaid card). This is the local plan name.

Card Copy On File

Check the Card Copy on File check box if a copy of the Medicaid card is on file and placed in the patient's chart.

Date Obtained

Use the drop-down list to select from the calendar the date the copy of the Medicaid card was placed in the patient's chart.

Relationship to Insured

Use one of the options from the drop-down list to define the relationship of the patient to the insured.

Group Name

Populate with the Medicaid group name. Click the "Magnifying Glass" icon to access the Table Lookup window where you can search for the group name. See section 3.5 Table Lookup for more information.

Group Number

Populate with the Medicaid group number.

Insured Name

Populate with the primary insured person's name.

Primary Care Provider

Populate with the name of the patient's primary care provider, for example, MORGAN,JAMESPAUL,JR.

Rate Code

Populate with the rate code, using 1 and 6 characters.

5.4.5.3 Grid on Edit Medicaid Fields Window

The grid at the bottom of the Edit Medicaid Fields window is where you add, edit, or delete the different types of coverage.

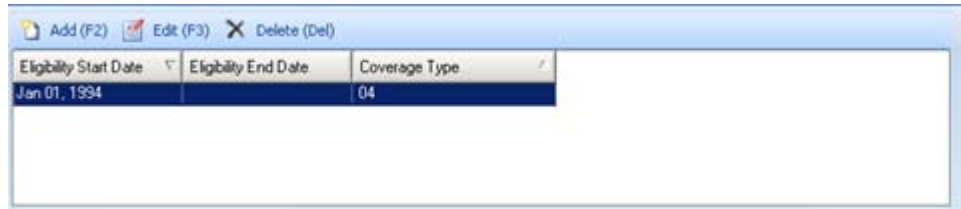


Figure 5-32: Add/Edit area on Edit Medicaid Fields window

5.4.5.3.1 Add Button

After clicking Add (or pressing F2), the application displays the Medicaid Eligibility dialog box.

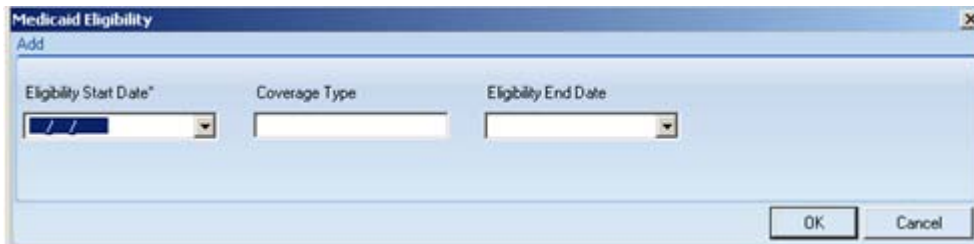


Figure 5-33: Medicaid Eligibility dialog box

Eligibility Start Date

Manually enter or select from calendar on the drop-down list the eligibility start date, as found on the patient's Medicaid card.

Coverage Type

Manually enter the coverage type as found on the patient's Medicaid card.

Eligibility End Date

Manually enter or select from calendar on the drop-down list the eligibility end date, as found on the patient's Medicaid card.

After this dialog box is complete, click OK (otherwise, click Cancel). After clicking OK, the application displays the data in the grid at the bottom of the Edit Medicaid Fields window.

5.4.5.3.2 Edit Button

Select a row in the grid that you want to change and then click Edit (or press F3). The application displays the Medicaid Eligibility dialog box. See Section 5.4.5.3.1 Add Button for more information completing this dialog box.

5.4.5.3.3 Delete Button

Select a row in the grid that you want to delete and then click Delete (or press the Delete key on your keyboard). The application confirms the deletion process by displaying the Delete Row information message.

5.5 Veteran/Documents Tab

The Veteran/Documents tab is divided into the Veteran Information, Documents, Other Names, and Death Information areas.

Demographics/EH Contact		Family / HHS/NUR		All Resources		Veteran/Documents		Other Patient Data		Reg Notes	
Veteran Information Shortcut Key: V <input type="button" value="Edit"/>											
Veteran: YES						Claim Number:					
Last Service Branch:						Service Separation Date:					
Service Entry Date:						Vietnam Service Indicated: NO					
Valid VA Card: NO						Is Service Connected: NO					
Date VA Card Copy Obtained:						Receiving VA Disability:					
Description of VA Disability:											
Documents Shortcut Key: D <input type="button" value="Edit"/>											
Notice of Privacy Practices: NO						Date:					
Acknowledgment Signed: YES						Reason Not Signed:					
Restricted Health Information: REVOKED						RHI Date:					
Status of Medical Record:											
Other Names Shortcut Key: L <input type="button" value="Edit"/>											
Aliases: DUCK,DAFFY; DUCK,DAFFYE, DUCK,DAFFY; DUCK,DAFFYE											
Legal Names:											
Death Information Shortcut Key: H <input type="button" value="Edit"/>											
Date of Death:						State of Death:					
Death Certificate:											

Figure 5-34: Sample Veteran Documents tab

5.5.1 Veteran Information Area

The Veteran Information area provides data about the Veteran status of the patient.

Veteran Information		Claim Number:	
Veteran:		Service Separation Date:	
Last Service Branch:		Vietnam Service Indicated:	
Service Entry Date:		Is Service Connected: NO	
Valid VA Card:		Receiving VA Disability:	
Date VA Card Copy Obtained:			
Description of VA Disability:			

Figure 5-35: Veteran Information area

Click Edit or use the shortcut key V (on your keyboard) to access the Veteran Information window.

If the veteran information is not applicable, the application will display the Veteran Information dialog box with a blank Veteran check box. The remaining fields on dialog box will be grayed out.

Figure 5-36: Sample Veteran Information window

After the Veteran Information window is complete, click Save (otherwise, click Cancel). The save function updates the data on the Veteran Information area of the Veteran/Documents tab.

Note: If the Veteran check box is already checked, the other fields will be available for changes.

The required fields have asterisks following their names.

Veteran

When the Veteran check box is selected, the other field will be active. If you uncheck the Veteran check box, this will cause the other fields become inactive.

Note: The application checks the age of the patient. If the patient is not eligible to be a veteran, the Veteran check box will show a missing data icon next to it. The hover help for the field explains why the patient is not eligible. In this case, uncheck the Veteran check box (this causes the other fields to be inactive).

Last Service Branch

Use one of the options from the drop-down list that indicates the name of the military branch in which the patient entered the last episode of military service.

Last Service Entry Date

Manually enter or use the drop-down list to select from the calendar a date that defines when the patient entered the last episode of military service.

Last Service Separation Date

Manually enter or use the drop-down list to select from the calendar a date that defines when the patient was separated from the last episode of military service.

Claim Number

Populate with this patient's claim number, using 6 or 7 characters, *or* enter 55 if the claim number is the same as the patient's SSN.

Receiving Disability

Use the option on the drop-down list (yes, no, unknown) to determine if the patient is receiving VA disability.

Description of Service Disability

Populate with a description of the service disability, using 3 to 60 characters (can be left empty).

Valid VA Card

Check the Valid VA Card check box to indicate that the patient has a valid VA card.

Date VA Card Copy Obtained

Manually enter or use the drop-down list to select from the calendar the date the copy of the VA card was obtained. If you want to populate the field with today's date, click the Today button.

Is Service Connected

Check the "Is Service Connected" check box to indicate that the disability is service connected.

Vietnam Service Indicated

Check the "Vietnam Service Indicated" check box to indicate that the disability is Vietnam Service indicated.

5.5.2 Documents Area

Figure 5-37: Sample Documents area

The Documents area contains information about the Notice of Privacy Practices, Restricted Health Information, and if the acknowledgement was signed.

Click Edit or use the shortcut key D (on your keyboard) to access the Document Information window.

The screenshot shows a window titled "Document Information DUCK_DAFFIE - 1928". It is divided into two main sections. The first section, "Notice of Privacy Practices", contains a checkbox labeled "NPP Rec'd by Patient", a date field labeled "Date of Privacy Practices*" with a "Today" button, a checkbox labeled "Acknowledgement Signed", and a text field labeled "Reason Acknowledgement Not Signed". The second section, "Restricted Health Information", contains a dropdown menu labeled "Restricted Health Information", a date field labeled "RHI Date", a text field labeled "RHI Official", a text field labeled "RHI Text", and a dropdown menu labeled "Status of Medical Record". At the bottom right of the window are "Save" and "Cancel" buttons.

Figure 5-38: Sample Document Information window

When the information is complete, click Save (otherwise, click Cancel). The save function updates the data in the Documents area of the Veteran/Documents tab.

The required field has the asterisk (*) after its name.

NPP Rec'd by Patient

Select this check box if the patient received the NPP (Notice of Privacy Practices).

Date of Privacy Practices

Manually enter or use the drop-down list to select a date from the calendar *or* click Today to populate the field with today's date. This is the date that the patient signed the Acknowledgement of Receipt of the Notice of Privacy Practices. This is a Health Insurance Portability and Accountability Act (HIPAA) requirement.

- If the NPP Rec'd by Patient check box is not selected, the Date of Privacy Practices field will be inactive.

Acknowledgement Signed

If the acknowledgement was signed, select the check box indicating that the signature was obtained.

Reason Acknowledgement Not Signed

If acknowledgement has not been signed, populate this field with the reason it was not signed.

- This field will be inactive if the Acknowledgement Signed check box is selected.

RHI Official

Specify the Official for the Restricted Health Information.

RHI Text

Populate with the text of the restricted health information.

Status of Medical Record

Select an option from the drop-down list to define the status of the patient's medical record.

5.5.3 Other Names Area

Use the Other Names area to specify aliases for the patient.



Figure 5-39: Sample Other Names area

Click Edit or use the shortcut key L to access the Other Names window.

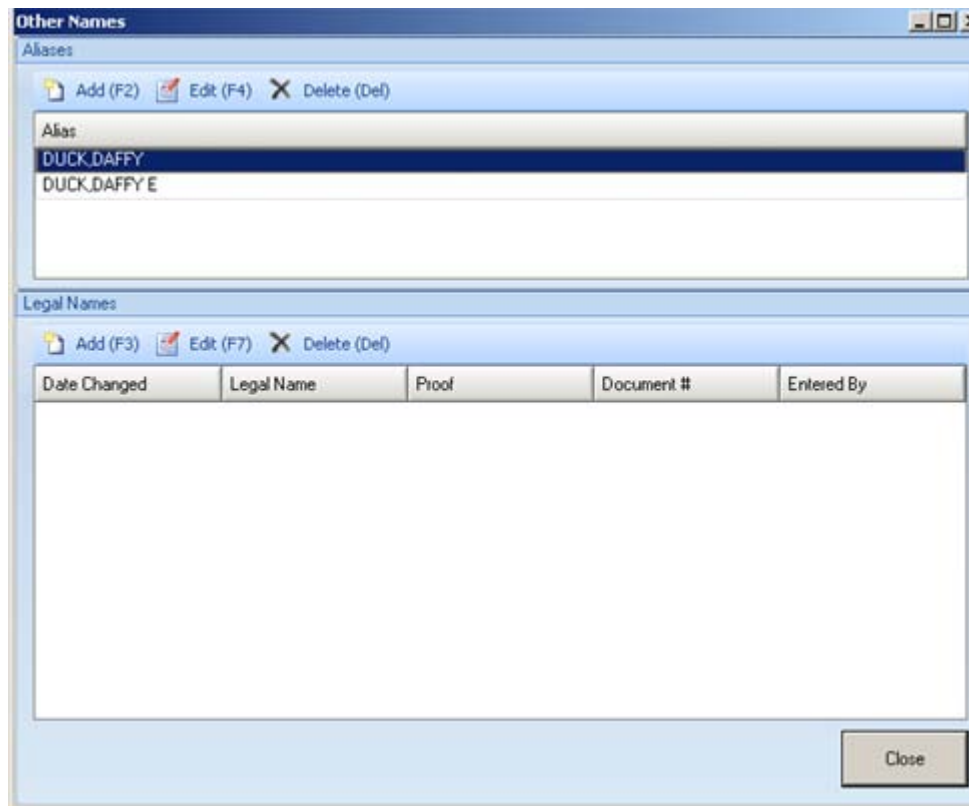


Figure 5-40: Sample Other Names window

Use the Other Names window to add aliases and legal names for the patient.

This window works differently that all others. You save the data within each group box in order to update the Aliases and/or Legal Names area of the Veteran/Documents tab.

After the Other Names window is complete, click Close to exit the window.

5.5.3.1 Aliases

Use the Aliases area to add aliases for the patient.

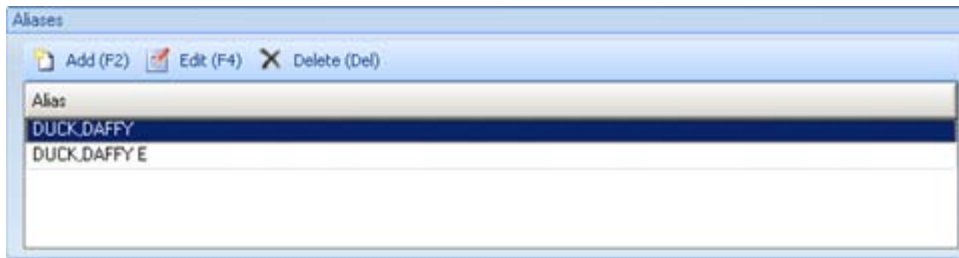


Figure 5-41: Sample Aliases area

5.5.3.1.1 *Add*

Click Add (or press F2) to access the Add Alias window.

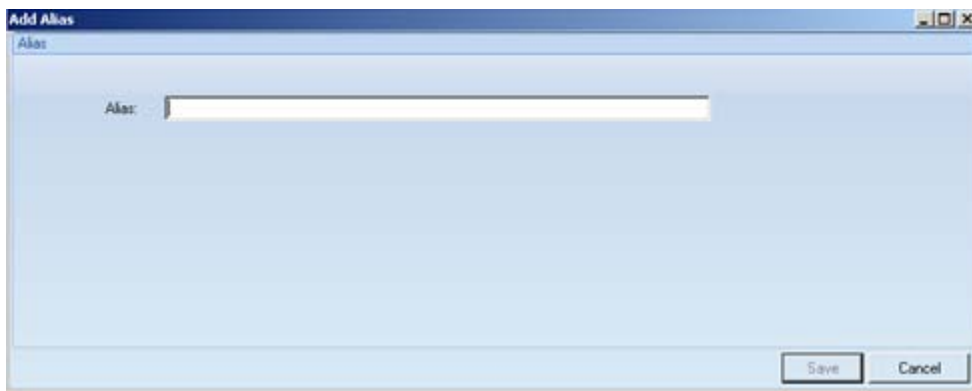


Figure 5-42: Add Alias window

Populate the Alias field with the alias name for the patient. When this window is complete, click Save (otherwise, click Cancel). The save process causes the alias name to appear on the Aliases area.

5.5.3.1.2 *Edit*

Select a row in the Alias grid that you want to change and then click Edit (or press F4). The application will display the Edit Alias window; this window functions like the Add Alias window. See Section 5.5.3.1.1 Add for more information.

5.5.3.1.3 *Delete*

Select a row in the Alias grid that you want to delete and then click the Delete button (or press the Delete key on your keyboard). The application displays the Delete Aliases information message that asks if you want to delete the selected record. Click Yes to delete the record. Click No to not delete the record. Use Cancel to exit the Delete Aliases information message. In all cases, you return to the Other Names window.

5.5.3.2 Legal Names

Use the Legal Names area to add legal names for the patient.

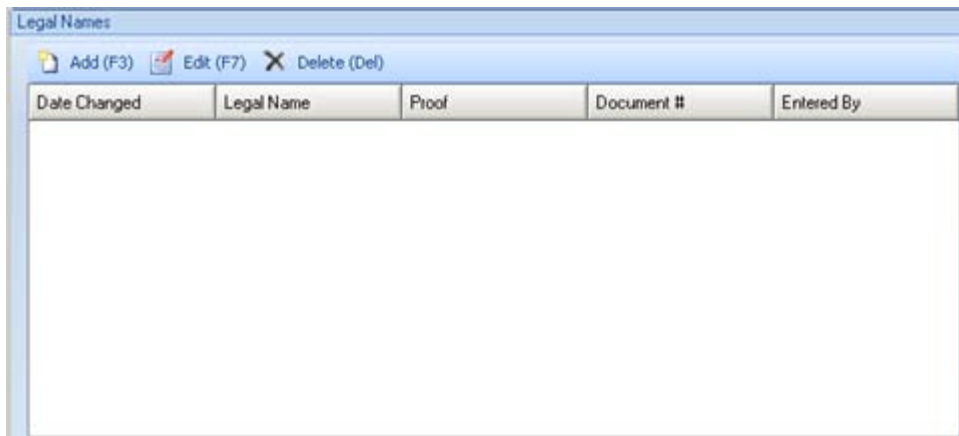


Figure 5-43: Sample Legal names area

5.5.3.2.1 Add

Click Add (or press F2) to access the Add Legal Name window.

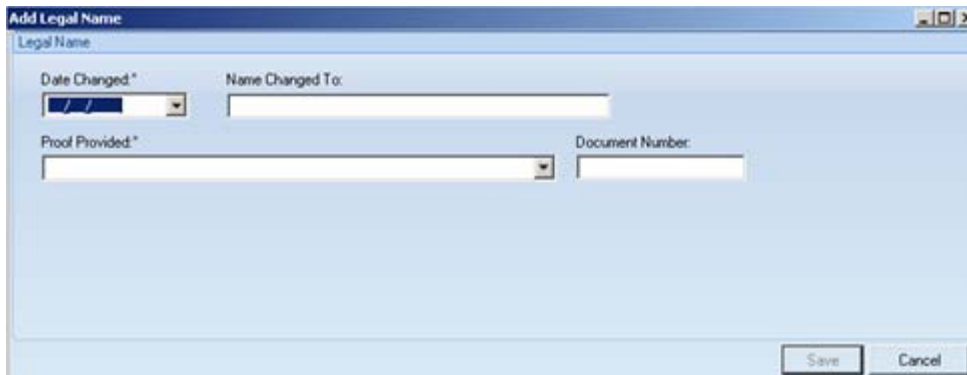


Figure 5-44: Add Legal Name window

The required fields have asterisks following their names.

Date Changed

Manually enter or select from the calendar on the drop-down list the date the legal name was changed.

Name Changed To

Populate with the text of the name change, using 3 to 45 characters.

Proof Provided

Select an option from the drop-down list that shows proof of the name change.

Document Number

Populate with the number of the document, using 3 to 20 characters.

When the Add Legal Name window is complete, click Save (otherwise, click Cancel). The save process updates the Legal Names area of the Other Names window.

5.5.3.2.2 *Edit*

Select a row in the grid you want to edit and then click Edit (or press F7 on your keyboard). The application displays the Edit Legal Name window. This window has the same field as the Add Legal Name window. See Section 5.5.3.2.1 Add for more information about the window.

5.5.3.2.3 *Delete*

Select a row in the grid you want to delete and then click Delete (or press the Delete key on your keyboard). The application displays the Delete Legal Name information message that asks if you want to delete the record. Click Yes to delete the record. Click No to not delete the record. Click Cancel to exit the information message.

5.5.4 Death Information Area

The Death Information area provides death information about the patient.



Figure 5-45: Death Information area

Click Edit or use the shortcut key H to access the Death Info window.

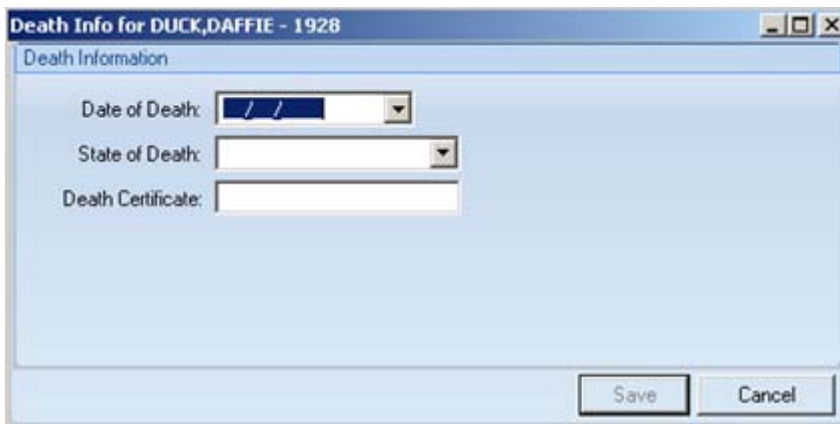


Figure 5-46: Death Info window

When the information is complete, click Save (otherwise, click Cancel). The save function updates the data in the Death Information area of the Veteran/Documents tab.

Below are the fields on the Death Info window.

Date of Death

Enter the date of death or use the drop-down list to select a date from the calendar when the death took place.

State of Death

Specify the state in which the death took place. Use any option from the drop-down list that contains the names of all 50 states in the United States and other countries. You can enter the first letter of the state or country and the list will scroll to that letter, then enter the second letter, and the list will scroll to that letter (an easy way to find the correct state or country).

Death Certificate

Populate with the number of the death certificate.

5.6 Other Patient Data Tab

The Other Patient Data tab shows other information, such as race, ethnicity, etc., about the patient.

Other Patient Data		Shortcut Key: O	Edit
Ethnicity:		Method of Collection:	
Race:		Preferred Language:	
Primary Language:		Other Languages:	
Interpreter required:			
English Proficiency:			
Migrant Worker:		Migrant Worker Type:	
Last Update:			
Homeless:		Homeless Type:	
Last Update:			
Internet Access: YES		Where:	
Last Update: May 05, 2010		Email Address:	
Number in Household:		Total Household Income:	

Figure 5-47: Other Patient Data tab

Click Edit or use the shortcut key O (on your keyboard) to access the Other Patient Data window.

Figure 5-48: Sample Other Patient Data window

When the Data Edit window is complete, click Save (otherwise, click Cancel). The save function updates the data on the Other Patient Data tab.

The required fields have asterisks following their names.

Ethnicity

Use one of the options from the drop-down list to define the ethnicity of the patient.

Method of Collection

Use one of the options from the drop-down list that specify the method of collection for determining the ethnicity. This field will be inactive the Ethnicity field is empty.

Race

Use one of the options from the drop-down list to define the race of the patient.

Primary Language

Use one of the options from the drop-down list to define the primary language of the patient.

Preferred Language

Use one of the options from the drop-down list to define the preferred language of the patient.

Interpreter Required

This field becomes active when Primary Language field is not English. Use one of the options from the drop-down list (yes or no) to determine if the patient needs an interpreter.

English Proficiency

If English is the Primary Language for the patient, choose from the options on the drop-down list to define the English proficiency of the patient. This field will be inactive if the Preferred Language field is empty.

Other Languages

The Other Languages area contains the other languages the patient speaks or uses.

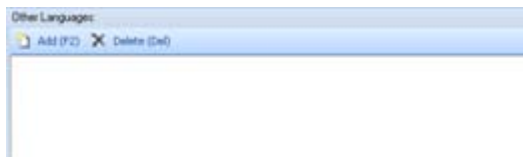


Figure 5-49: Sample Other Languages area

Add

Click Add (or press F2) to access the Add Other Languages dialog box.

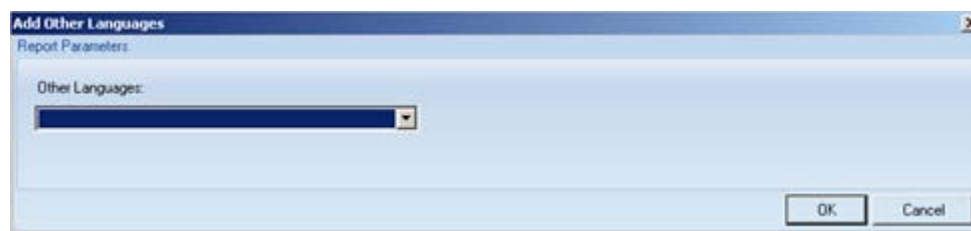


Figure 5-50: Add Other Languages dialog box

Select an option from the Other Languages drop-down list that indicates the other language that the patient speaks. After this dialog box is complete, click OK (otherwise, click Cancel). The save function updates the Other Language area.

Delete

Select a record in the Other Languages area you want to delete and click Delete (or press the Delete key on your keyboard). The application displays the Delete Rows information message, asking if you want to delete the record. Click Yes to delete. Click No to exit.

Migrant Worker

Use one of the options from the drop-down list to determine if the patient is a migrant worker (yes or no).

Migrant Worker Type

Use one of the options from the drop-down list to define the type of migrant worker that the patient is. This field is inactive if the Migrant Worker field is empty.

Homeless

Use one of the options from the drop-down list to determine if the patient is homeless (yes or no).

Homeless type

Use one of the options from the drop-down list to define what type of homeless the patient is. This field is inactive if the Homeless field is empty.

Internet Access

Use one of the options from the drop-down list (yes or no) to determine if the patient has Internet access.

Email Address

Populate with the patient's email address. This field is inactive if the Internet Access field is empty.

Access Internet From

This field indicates where the patient accesses the Internet.



Figure 5-51: Access Internet From area

Add

Click Add (or press F2) to access the Add Internet Method dialog box.



Figure 5-52: Add Internet Method dialog box

Select an option from the drop-down list for the Internet Access Method. Click OK (otherwise, click Cancel). The save function updates the Access Internet From area.

Delete

Select a record in the Other Languages area you want to delete and click the Delete button (or press the Delete key on your keyboard). The application displays the Delete Rows information message, asking if you want to delete the record. Click Yes to delete. Click No to exit.

Number in Household

Specify the number of people residing in the patient's household.

Total Annual Household Income

Specify the total household income.

Household Income Period

This field becomes active once you populate the “Total Annual Household Income” field. Use one of the options from the drop-down list to define the income period for the household income.

Status Date

The view-only field displays the date the information was last updated for migrant worker, homeless, and internet access.

5.7 Reg Notes Tab

The Registration Notes tab shows any notes about this patient’s registration.



Figure 5-53: Sample Reg Notes tab

You use the General Notes to add other notes about the registration record. Click Edit or use the shortcut key R to access the Reg notes window.

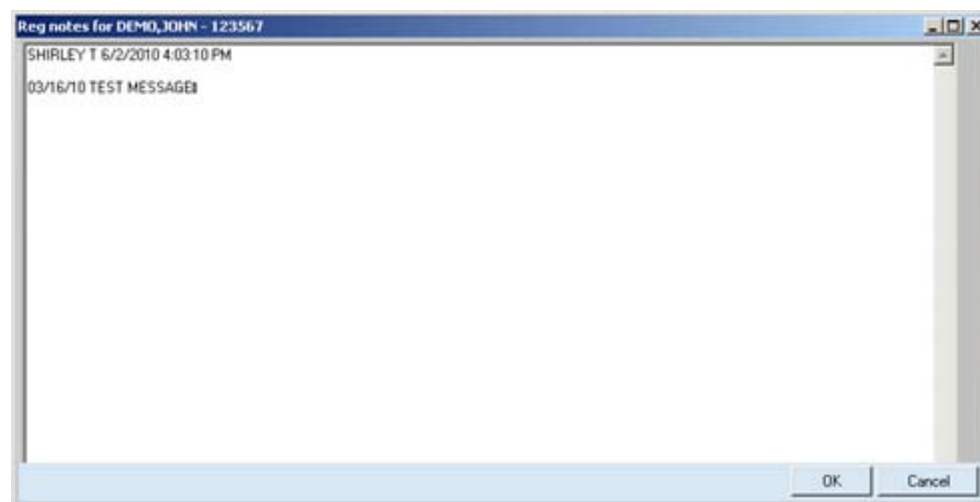


Figure 5-54: Sample Reg notes window

The application automatically adds the user’s name, the current date and time, and area for notes (below the second line of information). This is a free-text field where you can add additional notes about the patient registration for the current patient.

Place your cursor in the text area and type your message. You can use the context menu to aid in editing the text. See Section 3.3.1 Free Text Fields for more information.

After this area is complete, click OK (otherwise, click Cancel). The save function updates the data on the Reg Notes tab.

6.0 Reports

The Reports part of the toolbar ribbon provides access to Management and Face Sheet reports.

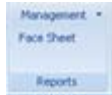


Figure 6-1: Reports area

All reports are pop-up windows. See Section 3.4 Pop-up Functionality for more information about this type of window.

6.1 Face Sheet

Click the Face Sheet option to display the Face Sheet pop-up window. This report applies to the current patient.

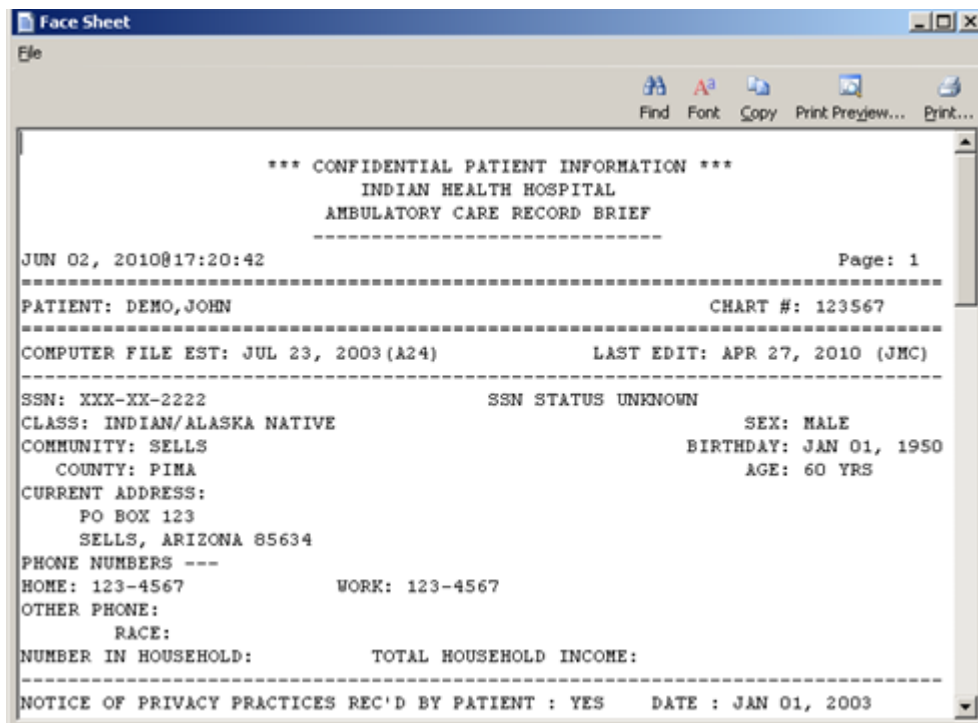


Figure 6-2: Sample Face Sheet pop-up window

This window provides the following information about the patient:

- Demographic data
- Status of Notice of Privacy Practices received by the patient
- Tribal data

- Parents data
- Contact data
- Third-Party Eligibility
- Insurance data
- Spouse's Employer
- Eligibility for Care status
- Additional Registration Information
- Historical Addresses and Email Addresses

Standard practice mandates that a face sheet be printed for each patient at the time of registration or edit. The face sheet should then be filed in the patient's chart so that if the clinic staff needs to contact the patient, the most current information and alternate resource information is available.

6.2 Management Reports

The drop-down list contains the Community Report, Daily Report, and Dup Pat Report.

6.2.1 Community Report

Select the Community Report option on the Management report area to access the Community Report parameters window.

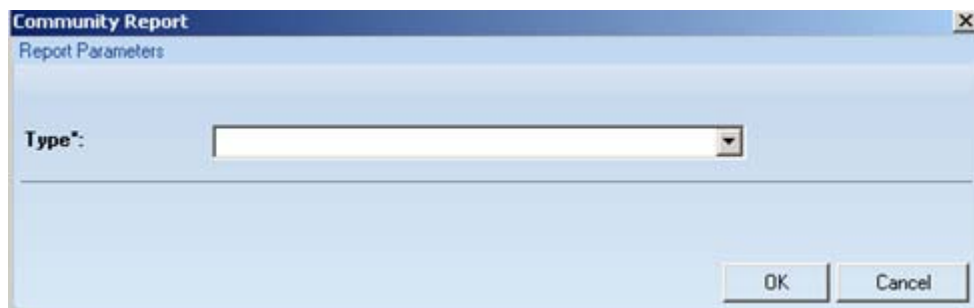


Figure 6-3: Community Report parameter dialog box

Click the drop-down list to select the type of report you want:

- Blanks Only—this report prints a list of all patient files that contain a blank city or community field.
- Both Blanks and Unknowns—this report prints a list of all patient fields that contain blank or “UNK” community or city fields. This report will not include any patient files with mismatched community or city fields.

- Complete (Blank, Mistakes, and Unknowns)—this report prints all blanks, mismatches, and unknowns. Files are considered to contain a mismatch where the City and Community fields don't match. This is a rare occurrence, but should be corrected when it does occur.
- Unknowns Only (Also Includes 'OTH')—this report prints a list of all patient files that contain any unknown communities (e.g., New Mexico UNK or New Mexico OTH). This list allows the user to return to patient files containing unknown (or "other") communities and attempt to update/correct the community name, because most communities are now in the system.

The application displays a pop-up window containing the data requested.

Click OK to output the report (otherwise, click Cancel). After clicking OK, the application displays the Patient Reg–Community Report pop-up window.

Use this report to clean up the community and city fields in the database.

6.2.2 Daily Report

Select the Daily Report option on the Management report area to access the Daily Report parameters dialog box.



Figure 6-4: Daily Report parameters dialog box

This report prints all registration information and other statistical data for all patients registered during a specified time period.

Specify the date range for the report using the date field.

Select an option from the Type field:

- NEW/REGISTERED Statistics and Patient from BEG. DATE to END DATE
- NEW/REGISTERED Statistics from BEG. DATE to END DATE
- NEW, EDITED, REMOVED Statistics and patient names
- NEW, EDITED, REMOVED Statistics only

Click OK to output the report (otherwise, click Cancel). After clicking OK, the application displays the Patient Reg–Daily Report pop-up window.

6.2.3 Dup Pat Report

Select the Dup Pat Report option on the Management report area to access the Dup Pat Report parameters dialog box.

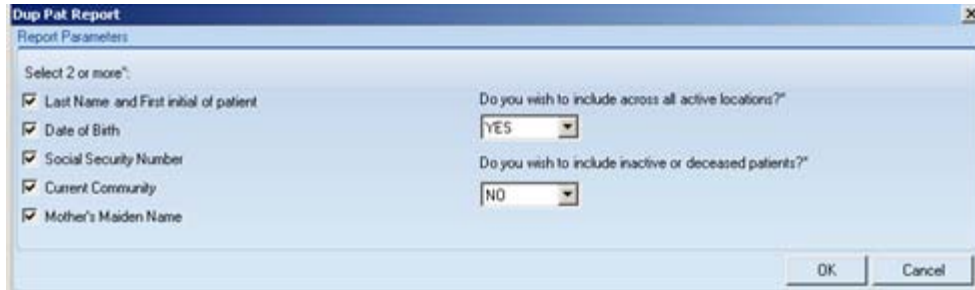


Figure 6-5: Dup Pat Report parameters dialog box

This report is intended to help identify duplicate patient records in the Registration system.

You need to check two or more checkboxes on the left. Then select an option from each of the questions (yes or no). These set the parameters for the report.

Click OK to output the report (otherwise, click Cancel). After clicking OK, the application displays the Patient Reg–Dup Pat Report pop-up window.

7.0 RPMS Rules of Behavior

The RPMS is a United States Department of Health and Human Services (HHS), IHS information system that is **FOR OFFICIAL USE ONLY**. The RPMS system is subject to monitoring; therefore, no expectation of privacy shall be assumed. Individuals found performing unauthorized activities are subject to disciplinary action including criminal prosecution.

All users (Contractors and IHS Employees) of RPMS will be provided a copy of the Rules of Behavior (RoB) and must acknowledge that they have received and read them prior to being granted access to a RPMS system, in accordance IHS policy.

- For a listing of general Rules of Behavior for all users, see the most recent edition of *IHS General User Security Handbook* (SOP 06-11a).
- For a listing of system administrators/managers rules, see the most recent edition of the *IHS Technical and Managerial Handbook* (SOP 06-11b).

Both documents are available at this IHS Web site: <http://security.ihs.gov/>

The RoB listed in the following sections are specific to RPMS.

7.1 All RPMS Users

In addition to these rules, each application may include additional RoBs that may be defined within the documentation of that application (e.g., PCC, Dental, Pharmacy).

7.1.1 Access

RPMS users shall

- Only use data for which you have been granted authorization.
- Only give information to personnel who have access authority and have a need to know.
- Always verify a caller's identification and job purpose with your supervisor or the entity provided as employer before providing any type of information system access, sensitive information, or non-public agency information.
- Be aware that personal use of information resources is authorized on a limited basis within the provisions *Indian Health Manual* Part 8, "Information Resources Management," Chapter 6, "Limited Personal Use of Information Technology Resources."

RPMS users shall not

- Retrieve information for someone who does not have authority to access the information.

- Access, research, or change any user account, file, directory, table, or record not required to perform your *official* duties.
- Store sensitive files on a personal computer (PC) hard drive, or portable devices or media, if access to the PC or files cannot be physically or technically limited.
- Exceed their authorized access limits in RPMS by changing information or searching databases beyond the responsibilities of their job or by divulging information to anyone not authorized to know that information.

7.1.2 Information Accessibility

RPMS shall restrict access to information based on the type and identity of the user. However, regardless of the type of user, access shall be restricted to the minimum level necessary to perform the job.

RPMS users shall

- Access only those documents they created and those other documents to which they have a valid need-to-know and to which they have specifically granted access through an RPMS application based on their menus (job roles), keys, and FileMan access codes. Some users may be afforded additional privileges based on the function they perform such as system administrator or application administrator.
- Acquire a written preauthorization in accordance with IHS policies and procedures prior to interconnection to or transferring data from RPMS.

7.1.3 Accountability

RPMS users shall

- Behave in an ethical, technically proficient, informed, and trustworthy manner.
- Logout of the system whenever they leave the vicinity of their PC.
- Be alert to threats and vulnerabilities in the security of the system.
- Report all security incidents to their local Information System Security Officer (ISSO)
- Differentiate tasks and functions to ensure that no one person has sole access to or control over important resources.
- Protect all sensitive data entrusted to them as part of their government employment.
- Abide by all Department and Agency policies and procedures and guidelines related to ethics, conduct, behavior, and information technology (IT) information processes.

7.1.4 Confidentiality

RPMS users shall

- Be aware of the sensitivity of electronic and hard copy information, and protect it accordingly.
- Store hard copy reports/storage media containing confidential information in a locked room or cabinet.
- Erase sensitive data on storage media, prior to reusing or disposing of the media.
- Protect all RPMS terminals from public viewing at all times.
- Abide by all HIPAA regulations to ensure patient confidentiality.

RPMS users shall not

- Allow confidential information to remain on the PC screen when someone who is not authorized to that data is in the vicinity.
- Store sensitive files on a portable device or media without encrypting.

7.1.5 Integrity

RPMS users shall

- Protect their systems against viruses and similar malicious programs.
- Observe all software license agreements.
- Follow industry standard procedures for maintaining and managing RPMS hardware, operating system software, application software, and/or database software and database tables.
- Comply with all copyright regulations and license agreements associated with RPMS software.

RPMS users shall not

- Violate federal copyright laws.
- Install or use unauthorized software within the system libraries or folders.
- Use freeware, shareware, or public domain software on/with the system without their manager's written permission and without scanning it for viruses first.

7.1.6 System Logon

RPMS users shall

- Have a unique User Identification/Account name and password.
- Be granted access based on authenticating the account name and password entered.

- Be locked out of an account after five successive failed login attempts within a specified time period (e.g., one hour).

7.1.7 Passwords

RPMS users shall

- Change passwords a minimum of every 90 days.
- Create passwords with a minimum of eight characters.
- If the system allows, use a combination of alpha, numeric characters for passwords, with at least one uppercase letter, one lower case letter, and one number. It is recommended, if possible, that a special character also be used in the password.
- Change vendor-supplied passwords immediately.
- Protect passwords by committing them to memory or store them in a safe place (do not store passwords in login scripts or batch files).
- Change password immediately if password has been seen, guessed, or otherwise compromised; and report the compromise or suspected compromise to their ISSO.
- Keep user identifications (IDs) and passwords confidential.

RPMS users shall not

- Use common words found in any dictionary as a password.
- Use obvious readable passwords or passwords that incorporate personal data elements (e.g., user's name, date of birth, address, telephone number, or social security number; names of children or spouses; favorite band, sports team, or automobile; or other personal attributes).
- Share passwords/IDs with anyone or accept the use of another's password/ID, even if offered.
- Reuse passwords. A new password must contain no more than five characters per eight characters from the previous password.
- Post passwords.
- Keep a password list in an obvious place, such as under keyboards, in desk drawers, or in any other location where it might be disclosed.
- Give passwords out over the phone.

7.1.8 Backups

RPMS users shall

- Plan for contingencies such as physical disasters, loss of processing, and disclosure of information by preparing alternate work strategies and system recovery mechanisms.
- Make backups of systems and files on a regular, defined basis.
- If possible, store backups away from the system in a secure environment.

7.1.9 Reporting

RPMS users shall

- Contact and inform their ISSO that they have identified an IT security incident and begin the reporting process by providing an IT Incident Reporting Form regarding this incident.
- Report security incidents as detailed in the *IHS Incident Handling Guide* (SOP 05-03).

RPMS users shall not

- Assume that someone else has already reported an incident. The risk of an incident going unreported far outweighs the possibility that an incident is reported more than once

7.1.10 Session Timeouts

RPMS system implements system-based timeouts that back users out of a prompt after no more than 5 minutes of inactivity.

RPMS users shall

- Utilize a screen saver with password protection set to suspend operations at no greater than 10 minutes of inactivity. This will prevent inappropriate access and viewing of any material displayed on their screen after some period of inactivity.

7.1.11 Hardware

RPMS users shall

- Avoid placing system equipment near obvious environmental hazards (e.g., water pipes).
- Keep an inventory of all system equipment.
- Keep records of maintenance/repairs performed on system equipment.

RPMS users shall not

- Eat or drink near system equipment.

7.1.12 Awareness

RPMS users shall

- Participate in organization-wide security training as required.
- Read and adhere to security information pertaining to system hardware and software.
- Take the annual information security awareness.
- Read all applicable RPMS manuals for the applications used in their jobs.

7.1.13 Remote Access

Each subscriber organization establishes its own policies for determining which employees may work at home or in other remote workplace locations. Any remote work arrangement should include policies that

- Are in writing.
- Provide authentication of the remote user through the use of ID and password or other acceptable technical means.
- Outline the work requirements and the security safeguards and procedures the employee is expected to follow.
- Ensure adequate storage of files, removal, and nonrecovery of temporary files created in processing sensitive data, virus protection, and intrusion detection, and provide physical security for government equipment and sensitive data.
- Establish mechanisms to back up data created and/or stored at alternate work locations.

Remote RPMS users shall

- Remotely access RPMS through a virtual private network (VPN) whenever possible. Use of direct dial in access must be justified and approved in writing and its use secured in accordance with industry best practices or government procedures.

Remote RPMS users shall not

- Disable any encryption established for network, internet, and Web browser communications.

7.2 RPMS Developers

RPMS developers shall

- Always be mindful of protecting the confidentiality, availability, and integrity of RPMS when writing or revising code.
- Always follow the IHS RPMS Programming Standards and Conventions (SAC) when developing for RPMS.
- Only access information or code within the namespaces for which they have been assigned as part of their duties.
- Remember that all RPMS code is the property of the U.S. Government, not the developer.
- Not access live production systems without obtaining appropriate written access, and shall only retain that access for the shortest period possible to accomplish the task that requires the access.
- Observe separation of duties policies and procedures to the fullest extent possible.
- Document or comment all changes to any RPMS software at the time the change or update is made. Documentation shall include the programmer's initials, date of change, and reason for the change.
- Use checksums or other integrity mechanism when releasing their certified applications to assure the integrity of the routines within their RPMS applications.
- Shall follow industry best standards for systems they are assigned to develop or maintain; abide by all Department and Agency policies and procedures.
- Document and implement security processes whenever available.

RPMS developers shall not

- Write any code that adversely impacts RPMS, such as backdoor access, "Easter eggs," time bombs, or any other malicious code or make inappropriate comments within the code, manuals, or help frames.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

7.3 Privileged Users

Personnel who have significant access to processes and data in RPMS, such as, system security administrators, systems administrators, and database administrators have added responsibilities to ensure the secure operation of RPMS.

Privileged RPMS users shall

- Verify that any user requesting access to any RPMS system has completed the appropriate access request forms.
- Ensure that government personnel and contractor personnel understand and comply with license requirements. End users, supervisors, and functional managers are ultimately responsible for this compliance.
- Advise the system owner on matters concerning information technology security.
- Assist the system owner in developing security plans, risk assessments, and supporting documentation for the certification and accreditation process.
- Ensure that any changes to RPMS that affect contingency and disaster recovery plans are conveyed to the person responsible for maintaining continuity of operations plans.
- Ensure that adequate physical and administrative safeguards are operational within their areas of responsibility and that access to information and data is restricted to authorized personnel on a need-to-know basis.
- Verify that users have received appropriate security training before allowing access to RPMS.
- Implement applicable security access procedures and mechanisms, incorporate appropriate levels of system auditing, and review audit logs.
- Document and investigate known or suspected security incidents or violations and report them to the ISSO, Chief Information Security Officer (CISO), and systems owner.
- Protect the supervisor, superuser, or system administrator passwords.
- Avoid instances where the same individual has responsibility for several functions (i.e., transaction entry and transaction approval).
- Watch for unscheduled, unusual, and unauthorized programs.
- Help train system users on the appropriate use and security of the system.
- Establish protective controls to ensure the accountability, integrity, confidentiality, and availability of the system.
- Replace passwords when a compromise is suspected. Delete user accounts as quickly as possible from the time that the user is no longer authorized system. Passwords forgotten by their owners should be replaced, not reissued.

- Terminate user accounts when a user transfers or has been terminated. If the user has authority to grant authorizations to others, review these other authorizations. Retrieve any devices used to gain access to the system or equipment. Cancel logon IDs and passwords, and delete or reassign related active and back up files.
- Use a suspend program to prevent an unauthorized user from logging on with the current user's ID if the system is left on and unattended.
- Verify the identity of the user when resetting passwords. This can be done either in person or by having the user answer a question that can be compared to one in the administrator's database.
- Follow industry best standards for systems they are assigned to, and abide by all Department and Agency policies and procedures.

Privileged RPMS users shall not

- Access any files, records, systems, etc., that are not explicitly needed to perform their duties.
- Grant any user or system administrator access to RPMS unless proper documentation is provided.
- Release any sensitive agency or patient information.

Glossary

APC Visit

Ambulatory Patient Care Visit; All types of health services that are provided on an outpatient basis, in contrast to services provided in the home or to persons who are hospital inpatients.

Dependents

A patient who is covered under another person's health insurance (Medicare, Medicaid, Private Insurance) or eligibility based on their dependent relationship to the policy holder/ eligible party. Dependents are often covered by third parties or eligibilities that they probably would not be eligible for otherwise. Children are the most common dependents.

Eligibility Date

Date that a patient became eligible for third-party financial coverage (Medicare, Medicaid, Private Insurance) of the patient's medical bills.

Eligibility End Date

The date by which a patient's third-party financial coverage must be approved/ renewed or the third-party is no longer responsible for the patient's medical bills. If a charge is billed after the eligibility end date for a date of service *before* the end date, the third-party financial coverage is still responsible for that bill. Any charges for dates of service *after* the Eligibility End Date are not the responsibility of the third-party financial coverage.

Embossed Card

A card with a patient's basic demographic and insurance information used for patient identification and billing. This card is kept in the patient's paper chart.

Employer

Company or person that has hired the patient, often offering private health insurance as part of the benefit package.

Face Sheet

A screen or printout that contains a patient's demographic and insurance information.

HRN

Health Record Number; a number assigned to each patient by the Medical Records Department (if possible).

Inactive File

A patient file that was already in the system but was deemed unusable at some later time. Reasons for inactivation include patient death or grossly incorrect entry of patient data. Patient files can also be inactivated after a pre-determined period of inactivity.

Medicaid

State subsidized health care coverage that covers patients who do not have the resources to cover the costs of their own medical care. Medicaid coverage is not automatic and must be applied for and approved. A patient's Medicaid coverage is always billed last.

Medicare

State subsidized health care coverage that covers patients over the age of 65. Medicare coverage is not automatic and must be applied for and approved. A patient's Medicare coverage is always billed first. See also: Railroad Retirement, Part A Medicare, and Part B Medicare.

Non-Mandatory Information

Information that is not required for the Quick Entry process for adding new patients. This generally includes insurance information.

NPIRS

National Patient Information Resource System; facility that collects and collates area statistical and patient data for official reporting purposes.

Queue

To instruct the computer to print a report at a specified later time. Queuing functions are usually used to print larger reports after hours, allowing the computer system to be used normally during business hours.

Railroad Retirement Medicare

A form of Medicare coverage that is extended only to retired railroad workers and their immediate family. *See also: Medicare*

RPMS

Resource and Patient Management System; suite of software programs maintained for IHS use.

Part A Medicare

A form of Medicare that covers only hospital visit and hospital visit related services. *See also: Medicare, Part B Medicare*

Part B Medicare

A form of Medicare that covers non-hospital visit services, including but not limited to general doctor visits and prescriptions. *See also: Medicare, Part A Medicare*

Private Insurance

Third-party financial coverage provided by a company (rather than a government agency). Private Insurance is usually provided through a patient's employer or patient's spouse's employer but can also be purchased independently. Private insurance always supersedes Medicaid coverage (billed before Medicaid) but is supplemental to Medicare coverage (billed after Medicare).

Security Key

Code, attached to an individual user's profile, that regulates the level of access that user has while using an RPMS program.

SSA

Social Security Administration; US Government department responsible for managing Social Security benefits to seniors and eligible disabled citizens.

SSN

Social Security Number; A nine-digit number assigned by the Social Security Administration for tracking and Social Security benefit purposes.

Temporary Chart Numbers

A chart number that is assigned to a patient for the purpose of temporarily entering them into the RPMS system. A patient's temporary chart number must be replaced through the Patient Registration program before that patient's data can be transmitted to NPIRS.

Third Party

Any billing or credit agency responsible for paying or collecting fees for patient care. This includes Medicare, Medicaid, and all private insurances.

Veteran

A person who has previously served in the US Military. Veterans generally receive special veteran's assistance for medical bills.

Contact Information

If you have any questions or comments regarding this distribution, please contact the OIT Help Desk (IHS).

Phone: (505) 248-4371 or (888) 830-7280 (toll free)

Fax: (505) 248-4363

Web: <http://www.ihs.gov/GeneralWeb/HelpCenter/Helpdesk/index.cfm>

Email: support@ihs.gov