



RESOURCE AND PATIENT MANAGEMENT SYSTEM

IHS Patient Merge

(BPM)

Installation Guide & Release Notes

Version 1.0
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Office of Information Technology (OIT)
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1.0 Release Notes

This is an Indian Health Service (IHS) modification of a module contained within the VA Kernel Toolkit - Duplicate Resolution System. The XT patch 1003 is required and can be installed at any time prior to installing this application. The BPM version 1.0 installation contains new IHS routines (in BPM namespace), all options (including XDR ones), templates, forms, etc.

2.0 Installation Notes

Prefix: BPM

Current Version: 1.0

Note: Read entire notes file prior to attempting any installation.

2.1 Contents of Distribution

File	Description
bpm_0100.k	IHS Patient Merge version 1.0 KIDS file Routines included: BPMCHK, BPMHRCN, BPMKALK, BPMKIDS , BPMMRG, BPMPTR, BPMPTR, BPMRP1, BPMU, BPMVAR, BPMVER, BPMX3PB, BPMXDRV, BPMXLR, BPMXLR2, BPMXPRB, BPMXTAX, BPMXVP, BPMXVST, BPMXWP
bpm_010i.pdf	IHS Patient Merge Installation Guide and Release Notes
bpm_010o.pdf	IHS Patient Merge Process Manual
bpm_010t.pdf	IHS Patient Merge Technical Manual
bpm_010u.pdf	IHS Patient Merge User Manual

IHS Patient Merge v1.0 Quick Reference Guide

Searching and Verifying

Required Keys: BPMZMENU, XDR

If You Need To:

Use This Menu Option:

Begin searching for potential duplicates.	S1 -> SRCH Start/Halt Duplicate Search
Check the status of the search for duplicate record pairs.	S1 -> DSS Display Search Status
Check if two patients are duplicates.	S1 -> CHCK Check Pair of Records to see if Duplicates
Find any potential duplicates for a single given patient.	S1 -> FIND Find Potential Duplicates for an Entry in a File
Check for any data errors that may exist in the patient record prior to merging.	S2 -> PMP Identify Potential Merge Problems
Review record pairs found in the search of the primary file to see if they are or are not duplicates.	S2 -> VPD Verify Potential Duplicates
Set the merge direction.	S2 -> VPD Verify Potential Duplicates
Apply data overwrites.	S2 -> VPD Verify Potential Duplicates
Add a specific unidentified pair of records to the Duplicate Record file.	S2 -> ADD Add Verified Duplicate Pair
Change the status of a duplicate record (e.g., Change the status from Verified Duplicate to Verified, Not Duplicate)	S2 -> EDIT Edit the Status Field of a Duplicate Record

Approving and Merging

Required Keys: BPMZMENU, XDR, BPMZMERG, DG ELIGIBILITY

*If You Need To:**Use This Menu Option:*

Approve verified duplicates to begin merging.	S3 -> AVD Approve verified duplicates for merging
Schedule the beginning of the merge process.	S3 -> SCH Schedule Process to Merge Verified Duplicates
Check the status of a merge process.	S3 -> CMP Check Merge Process Status
Stop a merge process.	S3 -> SMP Stop an Active Merge Process
Restart a merge process.	S3 -> RMP Restart a Merge Process

Reporting

Required Keys: BPMZMENU, XDR

*If You Need To:**Use This Menu Option:*

Print a list of duplicates grouped by status.	S1 -> PRNT Print List of File Duplicates PMR -> PLD Print List of File Duplicates
View details of a specified duplicate pair.	S1 -> VIEW View Duplicate Record Entries
Display overwrite decisions for a verified duplicate patient pair.	S2 -> DVP Display Verified Pair
Print a health summary either both before or after merges for a duplicate pair.	S3 -> HSV Health Summaries for Verified or Merged Pairs
Double check that all the information under the From patient was transferred over to the To patient's record.	S3 -> HSV Health Summaries for Verified or Merged Pairs
Print a count of the duplicate records grouped by status.	PMR -> TSM Tally Status and Merge Status Fields
Print a list of merged patients contained pre-merge data.	PMR -> PLM Print List of Merged Patients
Look for any pointers that were not changed by the merge process.	PMR -> LDAT List RPMS Data for a Patient
Print a list of all pointers for a particular entry.	PMR -> LDAT List RPMS Data for a Patient
Check that a merge was completed correctly.	PMR -> LDAT List RPMS Data for a Patient

Manager Functions

Required Keys: BPMZMENU, XDR, XDRMRG

*If You Need To:**Use This Menu Option:*

Edit the Patient Merge site parameters.	DMU -> SITE Edit Site Parameters
Purge entries from the Duplicate Record File.	DMU -> PDUP Purge Duplicate Record File
Delete selected completed merge batches.	DMU -> PMRG Purge Merge Process File
Shorten the list under the Check Merge Process Status option.	DMU -> PMRG Purge Merge Process File
Change Mail Groups for notification of errors or merge completions.	DMU -> SITE Edit Site Parameters

2.2 Required Resources

- Kernel Toolkit v7.3 patch 1003
- AUPN v99.1 patch 17 & 19
- APSP v7.0 patch 1004 (Pharmacy v7.0 is required)
- BHS v1.0 patch 1 (IHS components to VA Health Summary)
- LR v5.2 patch 1022 (if running Laboratory)
- PIMS v5.3 patch 1007 (with input transform fix on DG Security file date field)
- BDW v1.0 patch 2 (Data Warehouse patch)
- GIS v3.01 patch 15 (complements Data Warehouse patch changes)

- BQI v1.1 or greater (if running iCare)

2.3 Before You Begin

- Make a copy of this distribution for offline storage.
- Print all notes/readme files.
- We recommend that you create a printed audit trail, in case there are any problems with the installation.

To capture terminal output during the installation, use an auxport printer attached to the terminal on which you are performing the installation.

3.0 Installation Instructions

In all UCI's running RPMS:

1. Pre-Installation: Run the FileMan option CHECK/FIX DD STRUCTURE on the VA Patient file #2 and the PATIENT file #9000001.

This is necessary because the pointer "PT" nodes in the files' data dictionaries may contain entries for files that no longer exist. These missing files will interfere with the patient merge utilities. Running this option will remove the nodes that contain the missing files.

You should capture the output of this run for future reference.

2. Ensure all Patient Merge users are logged off, unless this is your first installation of the application.

Also, have all CHS users log off, as a CHS cross-reference will be re-indexed to ensure old data merges correctly.

There is no need to disable logins for all users.

3. Load the KIDS file using option 1 on the KIDS Installation menu. The file is named bpm_0100.k.
4. Verify the load using option 2 on the KIDS Installation menu.
5. Install the IHS Patient Merge v1.0 distribution using option 6 on the Installation menu.
6. Answer NO to all Yes/No questions.
7. After the installation is complete,
 - a. Add the BPMMENU to the AKMOCORE menu; then rebuild menus.

- b. Assign security keys to the authorized users.

XDR	For all HIM staff who will be using Patient Merge
BPMZMENU	For all HIM staff who will be using Patient Merge
BPMZMERG	For HIM staff who will be performing actual merges
XDRMGR	For HIM supervisor or IT staff. This key gives access to site parameters and purge options and allows bypassing threshold for adding duplicate pairs.

8. Set up the XDRBROWSER1 device.

For instructions, see the *IHS Patient Merge Technical Manual*, Section 2.5.3.

4.0 Sample Installations

```

load a Distribution
Enter a Host File: c:\tmp\bpm_0100.k <Enter>

KIDS Distribution saved on Sep 27, 2007@14:05:17
Comment: IHS PATIENT MERGE V1.0

This Distribution contains Transport Globals for the following Package(s):
OK to continue with Load? NO// Y <Enter> YES

Distribution OK!

Want to Continue with Load? YES// <Enter>
Loading Distribution...

Build IHS PATIENT MERGE 1.0 has an Environmental Check Routine
Want to RUN the Environment Check Routine? YES// <Enter>
  IHS PATIENT MERGE 1.0
Will first run the Environment Check Routine, BPMKIDS
Use INSTALL NAME: IHS PATIENT MERGE 1.0 to install this Distribution.

  1      Load a Distribution
  2      Verify Checksums in Transport Global
  3      Print Transport Global
  4      Compare Transport Global to Current System
  5      Backup a Transport Global
  6      Install Package(s)
         Restart Install of Package(s)
         Unload a Distribution

You have PENDING ALERTS
  Enter "VA to jump to VIEW ALERTS option

Select Installation Option: 6 <Enter> install Package(s)
Select INSTALL NAME: IHS PATIENT MERGE 1.0      Loaded from Distribution      Loaded
from Distribution 10/5/07@10:34:56
=> IHS PATIENT MERGE V1.0 ;Created on Sep 27, 2007@14:05:17

This Distribution was loaded on Oct 05, 2007@10:34:56 with header of
  IHS PATIENT MERGE V1.0 ;Created on Sep 27, 2007@14:05:17
  It consisted of the following Install(s):
  IHS PATIENT MERGE 1.0
  Checking Install for Package IHS PATIENT MERGE 1.0
  Will first run the Environment Check Routine, BPMKIDS

Install Questions for IHS PATIENT MERGE 1.0

Incoming Files:

  15      DUPLICATE RECORD (Partial Definition)
  Note: You already have the 'DUPLICATE RECORD' File.

  15.1    DUPLICATE RESOLUTION (Partial Definition)
  Note: You already have the 'DUPLICATE RESOLUTION' File.

  142     VA HEALTH SUMMARY TYPE (including data)
  Note: You already have the 'VA HEALTH SUMMARY TYPE' File.
  I will REPLACE your data with mine.

```

```
Want KIDS to Rebuild Menu Trees Upon Completion of Install? YES// N <Enter> NO
Want KIDS to INHIBIT LOGONS during the install? YES// N <Enter> NO
Enter the Device you want to print the Install messages.
You can queue the install by enter a 'Q' at the device prompt.
Enter a '^' to abort the install.
DEVICE: HOME// <Enter> VIRTUAL
Install Started for IHS PATIENT MERGE 1.0 :
      Oct 05, 2007@10:33:01
Build Distribution Date: Sep 27, 2007
Installing Routines:
      Oct 05, 2007@10:33:02
Running Pre-Install Routine: PRE^BPMKIDS
Installing Data Dictionaries:
      Oct 05, 2007@10:33:02
Installing Data:
      Oct 05, 2007@10:33:02
Installing PACKAGE COMPONENTS:
Installing SECURITY KEY
Installing PRINT TEMPLATE
Installing FORM
Installing OPTION
Installing PARAMETER DEFINITION
      Oct 05, 2007@10:33:03
Running Post-Install Routine: POST^BPMKIDS
EDITING DUPLICATE RESOLUTION SITE PARAMETERS
CLEANING UP PACKAGE FILE...
CLEANING UP ENTRIES WITH MISSING ZERO NODES...
187
188
190
194
208
213
214
```

```

CLEANING UP 'AFFECTS RECORD MERGE' MULTIPLE...
Removing duplicate xref 9999999902 in Pharmacy Patient File.
Re-indexing the "AC" xref in the CHS Facility file...
Adding Tribe of Membership to comparison criteria
Adding IHS parameter BPM USE IHS LOGIC
Cleaning up old patient merge entries
Cleaning up extra zero nodes in RPMS globals
Deleting ^PS(51,0,AUDIT)
Deleting ^PS(51,0,RD)
Deleting ^ICD(0,FY)
Deleting ^AMQQ(2,0,1)

Updating Routine file...
Updating KIDS files...

IHS PATIENT MERGE 1.0 Installed.
      Oct 05, 2007@10:33:19

NO Install Message sent

Call MENU rebuild

Starting Menu Rebuild:  Oct 05, 2007@10:35:09
Collecting primary menus in the New Person file...

                Primary menus found in the New Person file
                -----
OPTION NAME      MENU TEXT                # OF      LAST      LAST
                   USERS        USED        BUILT
AKMOEVE          IHS Kernel                11        10/05/07  10/05/07
AKMOCORE         IHS Core                   1         12/17/04  10/05/07

Building secondary menu trees...._
Merging.... done.
Menu Rebuild Complete:  Oct 05, 2007@10:35:14

Install Completed

```

5.0 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